

# **Installation + User manual**

## **Exact Synergy Enterprise Workflow Plus Version 14**

### **GLM Systems**

Version 2.5  
Version date 2 June 2014

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## 1. Introduction

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This document is for the installation and use of the features part of Workflow Plus add-on. The following features are available and explained:

- Multiple approval
- Visibility request field based on security level or role
- Email notification

### 1.1 Revision

Version	Date	Author	Description
1.0	23-04-2012	Gijs Lamers	First version
2.0	21-09-2013	Gijs Lamers	General update for the manual
2.1	17-10-2013	Gijs Lamers	Freefield extended to 50 and 10 additional free comment fields
2.2	09-01-2014	Gijs Lamers	License expiry message in left menu Extended role access level control
2.3	14-01-2014	Gijs Lamers	Updates based on comments Donas Group (Dave Kloeffer)
2.4	16-03-2014	Gijs Lamers	Version 13, support for browse field dependency on other request fields
2.5	02-06-2014	Gijs Lamers	Version 15, support for url links for free text fields

## 2. Installation

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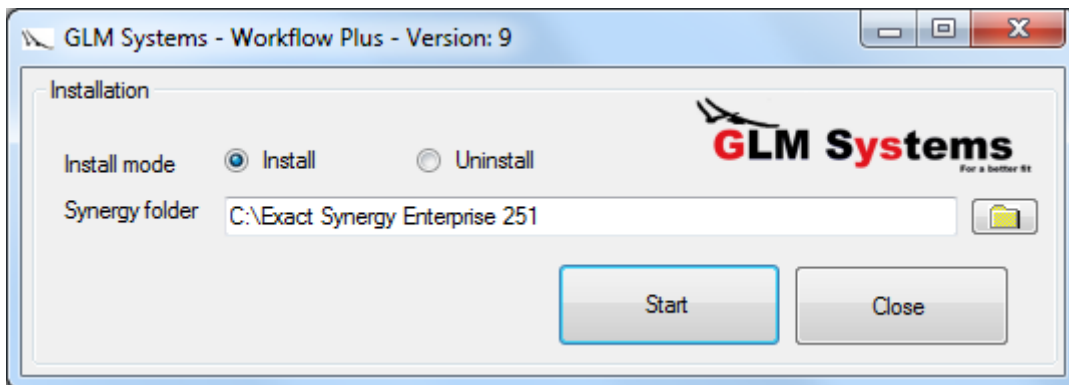
The installation consist of 3 steps:

1. Run the installer
2. Copy the license file
3. Generate metadata for email functionality

### 2.1 Run the installer

The installer as delivered contains a installer executable GLMSysAddOnInstaller.exe. To install the add-on run this executable.

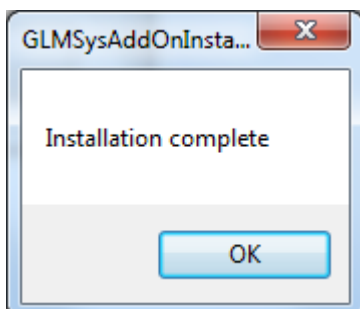
When starting the GLMSysAddOnInstaller.exe the following screen will be shown:



The title of the screen show which version of the Workflow Plus add-on is being installed.

Choose the install made 'Install' and in the 'Synergy folder' field select the location where Synergy is installed.

After the 'Synergy folder' is selected click start and the installation will start. When finished succesfully the following message is given.



## 2.2 Copy the license file

With the setup of the workflow plus you should have received a license file GLMSys.License.[Your exact license number].xml. For the workflow plus to work you will need to copy this file to the Synergy xml folder.

If you have the Event Manager from Vineyardsoft (KnowledgeSync Product) installed you will need to copy the license file also to the location where the Event Manager is looking for the Synergy files. This could be the Vineyard installation folder or a self-defined folder.

## 2.3 Generate metadata

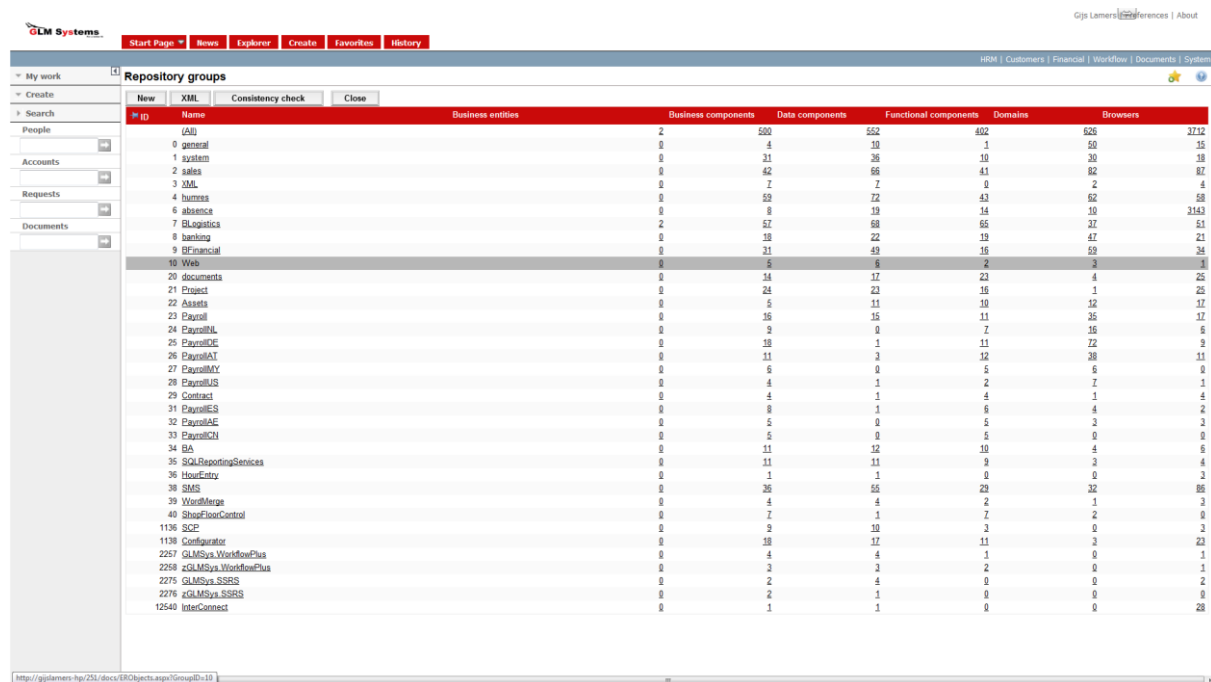
If you are using the GLM Tool(s) Workflow Plus e-Mail or Workflow Plus e-Mail Notification, then this step must be taken. If you are not using these functions, you may disregard this section.

After the installation and copying the license file open Synergy and when you install the Workflow Plus add-on for the first time the following screen will be shown:



When clicking update the database and repository of Exact Synergy will be updated to enable the Workflow Plus add-on.

After the update go to System – Setup – Repository – Explorer. Look for the repository group GLMSys.WorkflowPlus (ID 2257) and open this repository group.



ID	Name	Business entities	Business components	Data components	Functional components	Domains	Broswers
0	general	2	500	10	1	50	15
1	system	0	21	35	10	30	18
2	sales	0	42	66	41	82	87
3	XML	0	7	7	2	2	4
4	business	0	52	72	43	50	18
5	absence	0	9	19	14	10	143
7	Logistics	2	57	68	65	37	51
8	banking	0	18	22	19	47	21
9	Financial	0	21	49	16	59	34
10	Web	0	5	6	2	3	1
20	documents	0	14	17	23	4	25
21	Project	0	24	1	16	1	25
22	Assets	0	5	11	10	12	17
23	Payroll	0	16	15	11	35	17
24	PayrollNL	0	9	0	7	15	6
25	PayrollDE	0	18	1	11	72	9
26	PayrollAT	0	11	3	12	38	11
27	PayrollMY	0	6	0	5	6	0
28	PayrollUS	0	4	1	2	7	1
29	Contract	0	4	1	4	1	4
31	PayrollES	0	8	1	6	4	2
32	PayrollAC	0	5	0	5	3	3
33	PayrollCH	0	5	0	5	0	0
34	BA	0	11	12	10	4	6
35	SQLReportingServices	0	11	11	9	3	4
36	HourEntry	0	1	1	0	0	2
38	SMS	0	25	55	29	32	86
39	WorkMerge	0	4	4	2	1	3
40	ShowFlowControl	0	7	1	7	2	0
1136	SCP	0	9	10	3	0	3
1138	Configurator	0	18	17	11	3	22
2257	GLMSys.WorkflowPlus	0	4	4	1	0	1
2258	GLMSys.WorkflowPlus	0	3	3	2	0	1
2275	GLMSys.SSRG	0	2	4	0	0	2
2276	GLMSys.SSRG	0	2	1	0	0	0
12540	InterConnect	0	1	1	0	0	28

After opening the group look for the business component GLMSysWfSendEmail and open the business component

Gjls Lamers | Preferences | About

**GLM Systems** Start Page News Explorer Create Favorites History

HRM | Customers | Financial | Workflow | Documents | System

My work **Repository group**

Edit XML Consistency check Close

Group: GLMSys.WorkflowPlus Description:

Business entities (0) Business components (4) Data components (4) Functional components (1) Domains (0) Browsers (1)

Name	Description	Web service	Properties
GLMSysWfBrowser	Workflow Browsers		17
GLMSysWfEmailNotification	Workflow Plus Enable/Disable Email Notification		5
GLMSysWfRequestTask	Workflow Plus Request Task		13
GLMSysWfSendEmail	Workflow send email	GLMSysWfSendEmail	8

In the business component click 'Generate metadata'. This will update the file Exact.ServiceLocation.config. This update is needed to enable the email functionality.

Gjls Lamers | Preferences | About

**GLM Systems** Start Page News Explorer Create Favorites History

HRM | Customers | Financial | Workflow | Documents | System

My work **Business component**

Edit Test Consistency check Generate metadata Close

Name: GLMSysWfSendEmail Group: GLMSys.WorkflowPlus

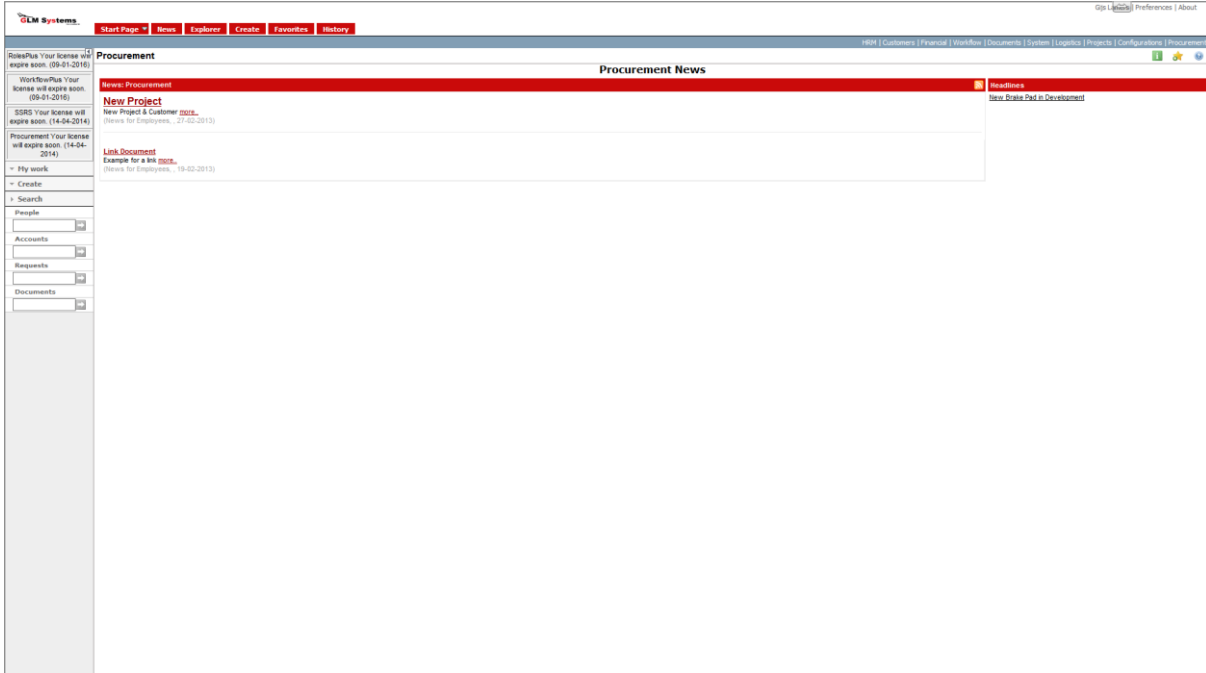
Description: Workflow Plus

Properties (0) Data components (3) Functional components (0) Business components (0) Operation permissions (0)

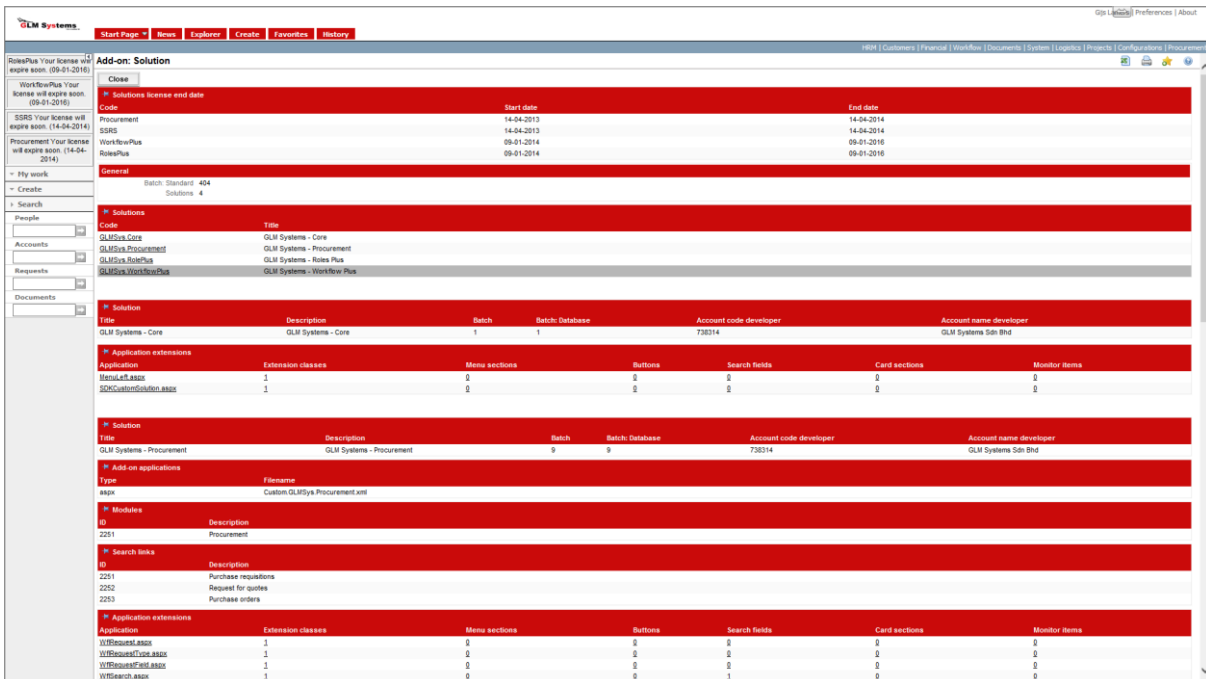
Property	Data source	Source field	Domain	Basic type	Precision	Scale	Mandatory	Service exposed	Service property name	Security context included
Created	GLMSysWfSendEmailData	syscreated	DateTime	datetime	0	0	✓	✓	CreateDate	
Creator	GLMSysWfSendEmailData	syscreator	HumResID	number	10	0	✓	✓	Creator	
CreatorFullName	HumResRefData	FullName	Name (humres)	string	64	0	✓	✓	CreatorName	
ID	GLMSysWfSendEmailData	sysid	GUID	guid	16	0	✓	✓	ID	
Modified	GLMSysWfSendEmailData	sysmodified	DateTime	datetime	0	0	✓	✓	ModifiedDate	
Modifier	GLMSysWfSendEmailData	sysmodifier	HumResID	number	10	0	✓	✓	Modifier	
ModifierFullName	HumResRefData	FullName	Name (humres)	string	64	0	✓	✓	ModifierName	
Requestid	GLMSysWfSendEmailData	Requestid	GUID	guid	16	0	✓	✓	Requestid	

## 3. License

The license has an end date when the end date is within one month a license message will be shown in your left menu. This is to inform you that you have to request for a new license



You can see when your license will expire via the menu system – reports – add – ons – solutions. The first table will display the add-on license start date and end date.



Code	Start date	End date
Procurement	14-04-2013	14-04-2014
SSRS	14-04-2013	14-04-2014
WorkflowPlus	09-01-2014	09-01-2016
WorkflowPlus	09-01-2014	09-01-2016

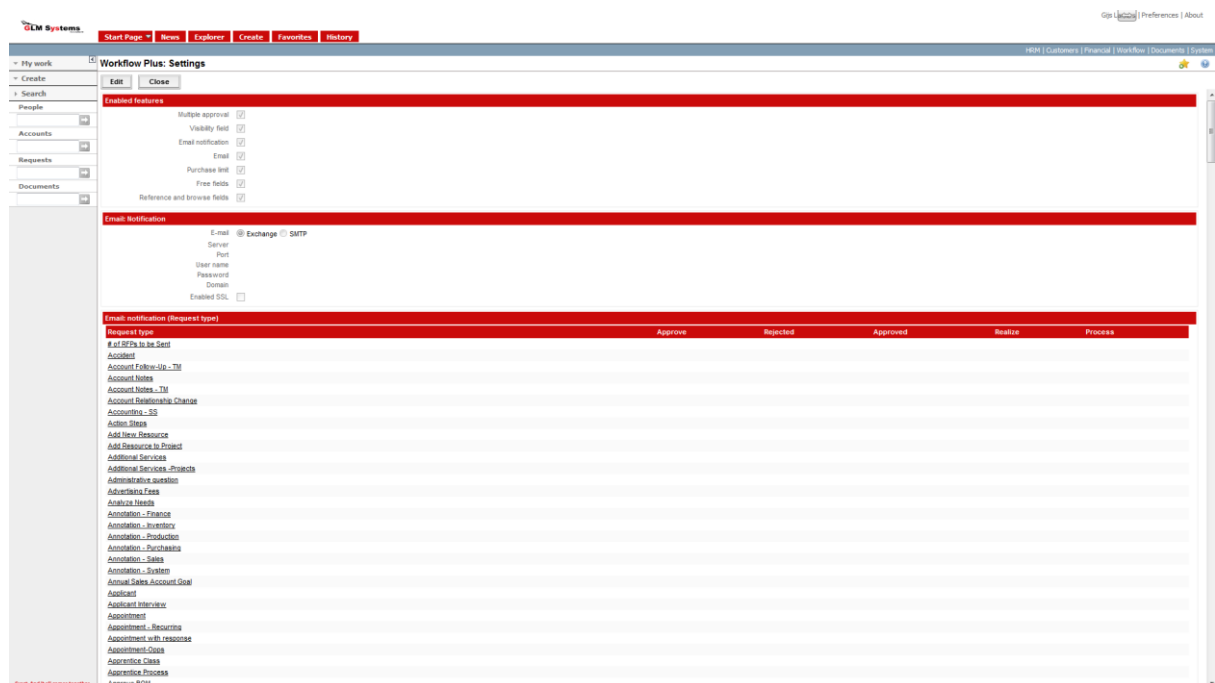


## 4. Setup

### 4.1 Introduction

This setup chapter will describe how to setup the use for multiple approval, visibility request field based on security level or role, Email notification, Email, Free fields, Purchase limit and reference and browse free field which are part of the add-on Workflow Plus depending on which feature is purchased this will be enabled for your company.

Under the Workflow / Setup / General menu their is a new function 'Settings: Workflow Plus' this function is to maintain the settings of the Workflow Plus add-on and it will show which features are enabled.



Request type	Approve	Rejected	Approved	Realize	Process
# of BOMs to be Sent					
Account					
Account Follow-Up - TM					
Account Notes					
Account Notes - TM					
Account Relationship Change					
Accounting - SS					
Action Steps					
Add New Resource					
Add Resource to Project					
Additional Services					
Additional Services - Projects					
Administrative questions					
Advertising Fees					
Analysis Needs					
Annotations - Financial					
Annotations - Inventory					
Annotations - Production					
Annotations - Purchases					
Annotations - Sales					
Annotations - System					
Annual Sales Account Goal					
Applicant					
Applicant Interview					
Appointment					
Appointment - Recursion					
Appointment with resource					
Appointment class					
Appointment class					
Appointment Process					
Approve BOM					

## 4.2 Multiple approval

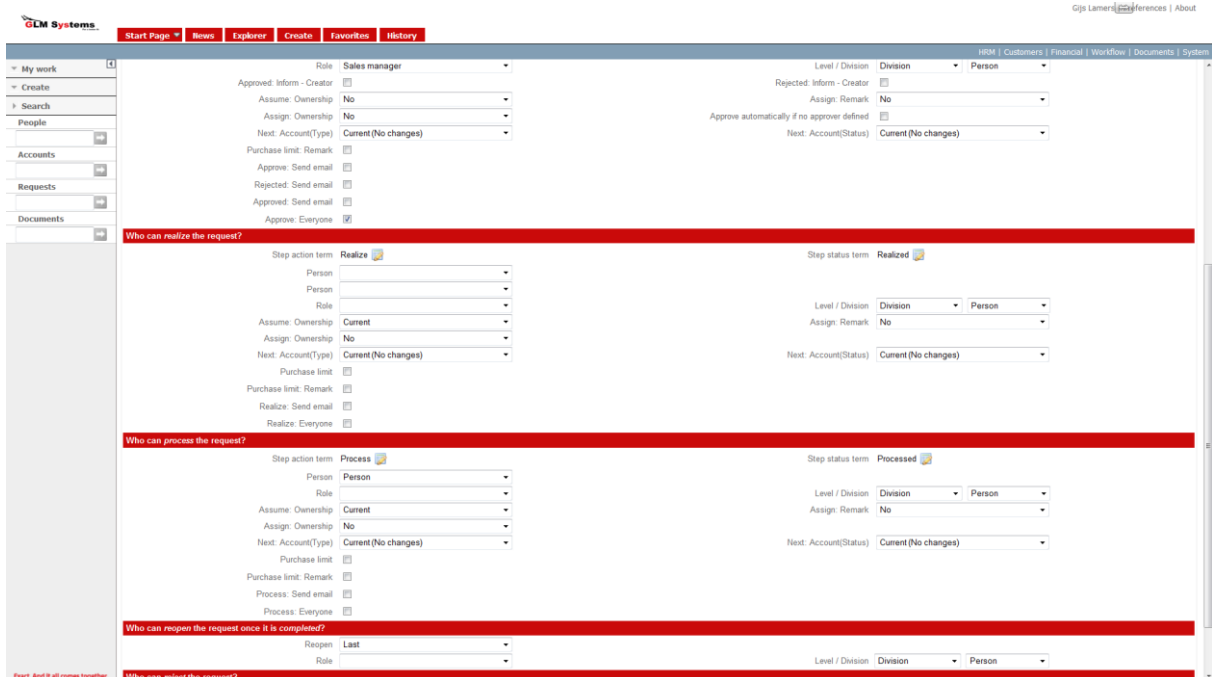
When the multiple approval feature is used it will only go to the next stage / step in the workflow when all involved users have completed their action. For example when you enable the multiple approve for the approve stage where a role is linked and this role has 3 users all of the users should approve before the request will go to the realize stage.

For the multiple approvals the setup is done at the maintenance of the request type in the 'flow' section.

Determine the request type where you want to have multiple approval, realization or processing and open the maintenance for this request type in Workflow / Setup / Requests / Request Types.

At the flow tab there are three extra checkboxes for the multiple approval:

- Approve: everyone
- Realize: everyone
- Process: everyone



The screenshot shows the 'Request Types' maintenance screen in GLM Systems. The interface is divided into several sections for configuring workflow steps. The 'Who can realize the request?' section is currently active, showing options for 'Step action term' (Realize), 'Step status term' (Realized), and various assignment and next account settings. The 'Approve: everyone' checkbox is checked. Other sections like 'Who can process the request?' and 'Who can reopen the request once it is completed?' are also visible but not currently active.

Based on the business requirement from the user you can determine which step in the process flow needs action from each user before the request will go to the next status in the process.

When enabling/checking the 'approve: everyone' this will mean that all users which have the request in their workflow will need to approve before the request will go to the next status for realization or processing. Similar logic applies for 'Realize: everyone' and 'Process: everyone'

For a request with the multiple approval enabled it will show additional information in the steps displayed in the request. It will show who already approved the request in addition who still needs to approve the request.

Gis Lamer | Preferences | About

**GLM Systems** Start Page News Explorer Create Favorites History

HRM | Customers | Financial | Workflow | Documents | System

My work **Multiple Approvers Example - 00.034.636** Status: Open Modified: Susan Brooks 09/21/2013 12:25

Save Refresh Delete Copy Approve Reject Close

People Create

Accounts

Requests

Documents

Person: Gis Lamer — CEO — Integrated

Description: Multiple approve

Account:

Remarks: Request

Timestamp Full screen

**Approvals**

Jan Huygen  
Role: Sales manager  
Level: Division  
Approved: Gis Lamer, Susan Brooks

**Process**

Person

In the workflow search three new columns 'Approved: everyone', 'Realized everyone', 'Processed everyone' are available which will show all the users which have approve, realized or processed. The columns can be added via the customize function of the workflow search.

Gis Lamer | Preferences | About

**GLM Systems** Start Page News Explorer Create Favorites History

HRM | Customers | Financial | Workflow | Documents | System

My work **Workflow: Search - Requests**

Search Export Create letter Create email Close

ID: 034.636

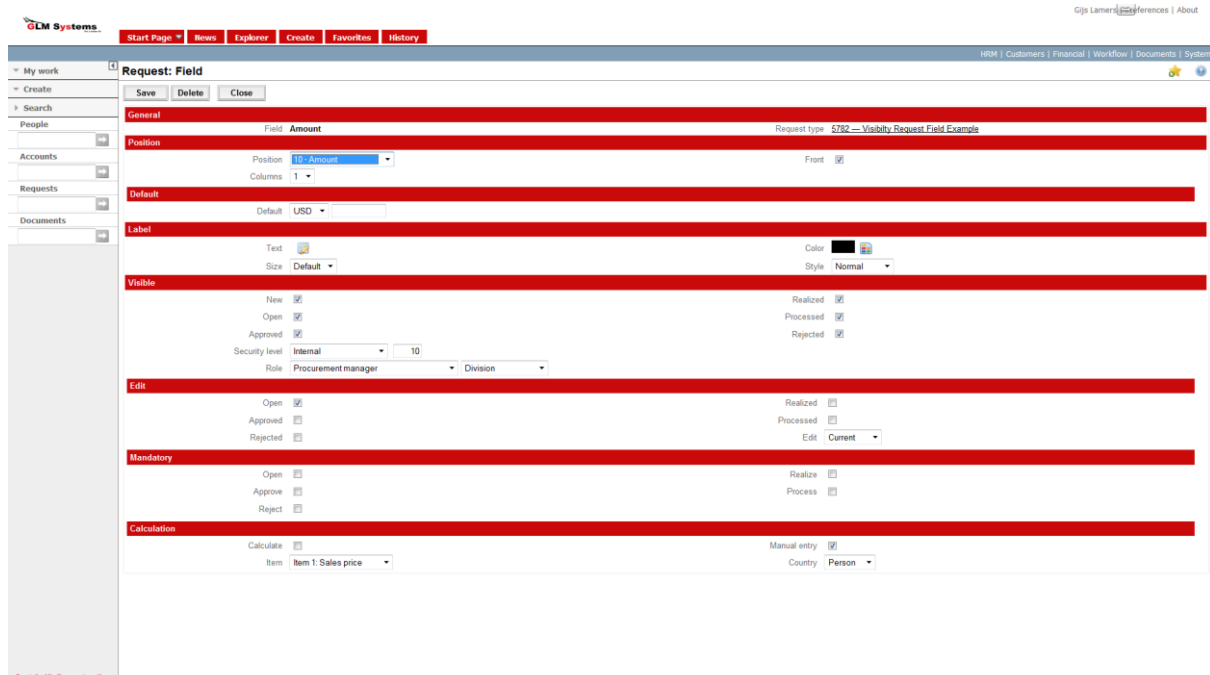
Created	Creator	Description	Type	Person	Account	Item 1	Status	Approved: Everyone	Realized: Everyone	Processed: Everyone
09/21/2013	Gis Lamer	Multiple approve	Multiple Approvers Example	Gis Lamer			Open	Susan Brooks, Gis Lamer		

Page size: 15 Show

### 4.3 Visibility request field based on security level or role

The setup of the visibility request field is done at the request field as part of the maintenance of the request type. When opening a specific 'request field' or 'request section' there are two new fields in the visible section:

- Security level
- Role



To determine who can view a request field set the specific security level or role to determine who can view the request field.

Persons who can view the request but have a lower security level as defined for a specific field will not see this field. Persons who have the same or a higher security level will see this specific field.

Same logic applies for the role where only person with the role as defined for a specific field will be able to see the field in the request. If a person doesn't have the role then this person will not be able to see this field.

In the setup as shown above where the field is only visible for the procurement manager he can see the field when creating a new request. For a person without the procurement manager role the field will not be visible.

GLM Systems Logged in as Randy Pearson | Log off | Preferences | About

**Start Page** **News** **Explorer** **Create** **Favorites** **History**

---

My work **Visibility Request Field Example - New** HRM | Customers | Financial | Workflow | Documents

Status: New Submit Edit Draft Close

**Create** Approve

**Randy Pearson** Manager: Person

09/21/2013 12:36

Person: 11052 **Randy Pearson — Legal Staff — Integrated**

Description: USD **US Dollar**

Amount (Planned): Internal 10

Start date: 09/21/2013

End date: / /

Hours: 0.00

Remarks: Request

**Timestamp** **Full screen**

Attachments Browse...

Total attachments size allowed: 500 MB

GLM Systems Gigi Lamer | Preferences | About

**Start Page** **News** **Explorer** **Create** **Favorites** **History**

---

My work **Visibility Request Field Example - New** HRM | Customers | Financial | Workflow | Documents | System

Status: New Submit Edit Draft Close

**Create** Approve

**Gigi Lamer** Manager: Person

09/21/2013 12:36

Person: **Gigi Lamer — CEO — Integrated**

Description: Internal 10

Start date: 09/21/2013

End date: / /

Hours: 0.00

Remarks: Request

**Timestamp** **Full screen**

Attachments Browse...

Total attachments size allowed: 500 MB

#### 4.4 Fields only editable in new mode

In the request definition you can set if a request field can be edited in open, approve, realize or process status. In the standard request definition it is not possible to make a field editable in new status but non editable in the other statuses.

An additional option is added to the request field definition which makes it possible to set the editable option for the new mode.

GLM Systems Help | Customers | Financial | Workflow | Documents | System | Logistics | Projects | Configurations | Procurement

Start Page | News | Explorer | Create | Favorites | History

My work | Create | Search

People | Accounts | Requests | Documents

### Request Field

Save | Delete | Close

**General**

Field:  Description  Request type: 124200 — Role Access Level  
 Entity:  Property:

**Position**

Position: 2 — Description  Front: ☒  
 Columns: 2

**Default**

Default:

**Label**

Text:  Color:    
 Size: Default  Style: Normal

**Visions**

New: ☒ Realized: ☒  
 Open: ☒ Processed: ☒  
 Approved: ☒ Rejected: ☒  
 Security level: Internal  10  
 Role:

**Edit**

Open: ☐ Realized: ☐  
 Approved: ☐ Processed: ☐  
 Rejected: ☐ Edit: Current   
 New: ☒

**Mandatory**

Open: ☒ Realize: ☒  
 Approve: ☒ Process: ☒  
 Reject: ☐

Exact, And it all comes together.

GLM Systems Help | Customers | Financial | Workflow | Documents | System | Logistics | Projects | Configurations | Procurement

Start Page | News | Explorer | Create | Favorites | History

My work | Create | Search

Person | Account | Request | Document

### Role Access Level - New


Status: New

Submit | Edit | Draft | Close

Person: 1  GLM Systems — CEO — Integrated  
 Description: Only editable in new mode  
 Security level: Internal  10  
 Start date: 09-01-2014   
 End date: - -

Approve: Manager Person  
 Revoke: Role 98  
 Level: Division (Person)

Exact, And it all comes together.



Start Page
Home
Explorer
Create
Favorites
History

[Help](#)
[Logoff](#)
[Preferences](#)
[About](#)

My work

Create

Search

People

Accounts

Requests

Documents

Role Access Level - 00.034.868

Save

Refresh

Delete

Copy

Approve

Reject

Close

GLM LAMERS

09-01-2014 21:20

GLM LAMERS

Manager/Person

GLM LAMERS

Level Division (Person)

Person

Only editable in new mode

Internal

10

Start date

09-01-2014


End date

## 4.5 Email notification

The email notification feature will send an email automatically when a person receives a new request in their workflow. For persons who don't want to receive this email this also can be disabled.

The setup for the email notification is done at in the 'Workflow Plus – Settings' page and in the request type maintenance.

To be able to send the email the email server details need to be defined in 'Workflow Plus: Settings' application.



In the Workflow Plus settings there are the following fields to setup the email server, these settings can only be maintained by the administrator:

**E-mail:** Exchange or SMTP

**Server:** Server which has the email program to send from

**Port:** Port to use to send the email to the email server, optional

**User name:** User name which will be used to login in to the email server

**Password:** Password to login to the email server

**Enabled SSL:** Enable or disable SSL

In the settings there is also a list of request types and their respective actions. Each user can open the workflow plus settings and by clicking on the 'send email' check or cross to determine if they want to receive a notification email yes or no.

Email: Notification			
Person: 1 			
Request type	Action	Person	Send email
Sales question	Approve	Gjs Lamers	<input checked="" type="checkbox"/>



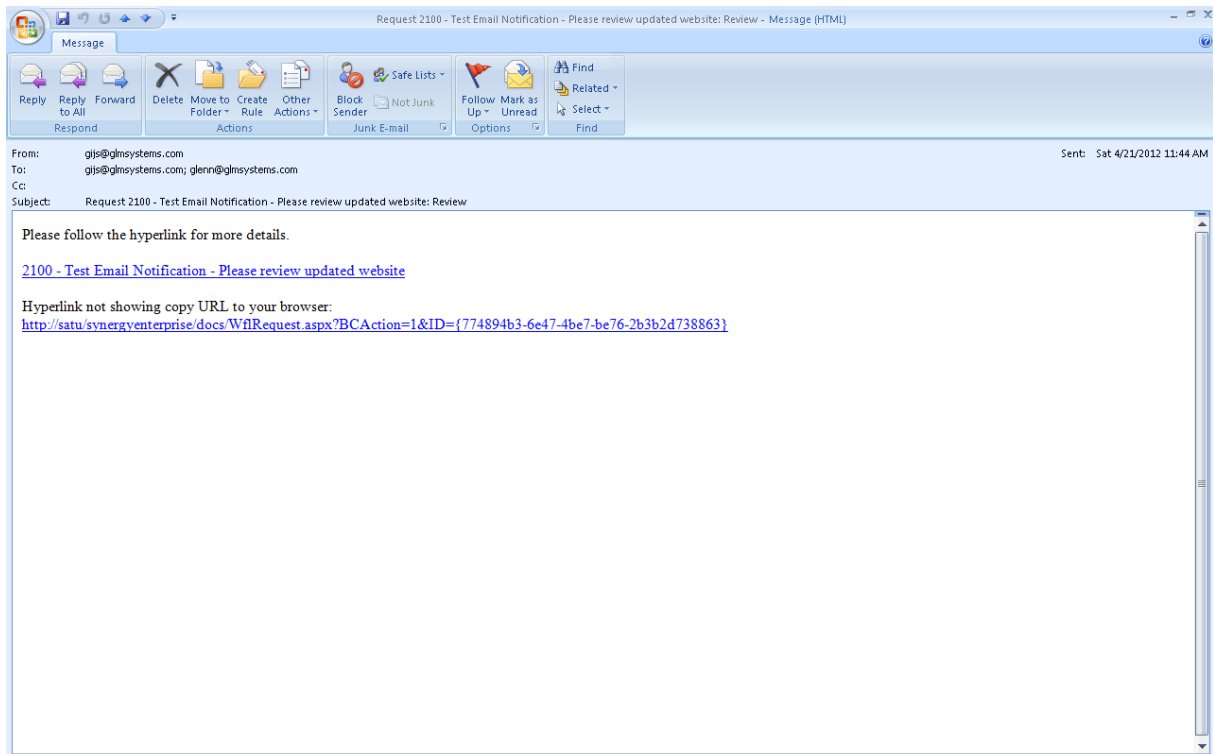
In the request type maintenance 'Flow' tab there are 5 new fields:

- Approve: Send email
- Rejected: Send email
- Approved: Send email
- Realize: Send email
- Process: Send email

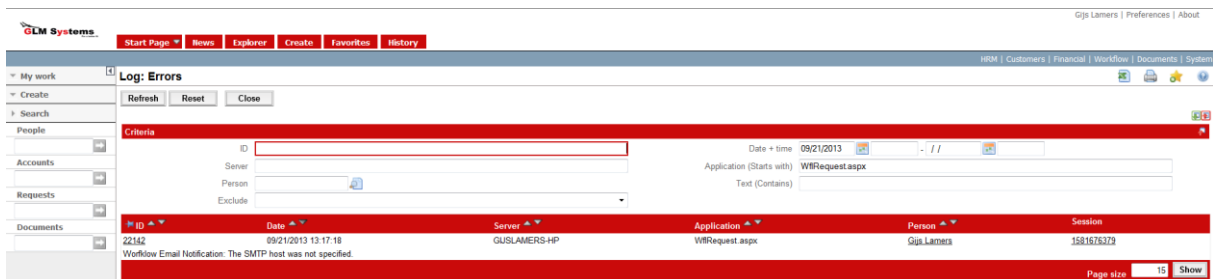
Next: Account(Type) <span style="float: right;">Current (No changes)</span> Purchase limit: Remark <input type="checkbox"/> Approve: Send email <input checked="" type="checkbox"/> Rejected: Send email <input type="checkbox"/> Approved: Send email <input type="checkbox"/> Approve: Everyone <input type="checkbox"/>	Next: Account(Status) <span style="float: right;">Current (No changes)</span>
Who can realize the request?	
Step action term <span style="float: right;">Realize</span> Person <input type="text"/> Person <input type="text"/> Role <input type="text"/> Assume: Ownership <span style="float: right;">Current</span> Assign: Ownership <span style="float: right;">No</span> Next: Account(Type) <span style="float: right;">Current (No changes)</span> Purchase limit <input type="checkbox"/> Purchase limit: Remark <input type="checkbox"/> Realize: Send email <input type="checkbox"/> Realize: Everyone <input type="checkbox"/>	Step status term <span style="float: right;">Realized</span> Level / Division <span style="float: right;">Division</span> <span style="float: right;">Person</span> Assign: Remark <span style="float: right;">No</span> Next: Account(Status) <span style="float: right;">Current (No changes)</span>
Who can process the request?	
Step action term <span style="float: right;">Process</span> Person <input type="text"/> Role <input type="text"/> Assume: Ownership <span style="float: right;">Current</span> Assign: Ownership <span style="float: right;">No</span> Next: Account(Type) <span style="float: right;">Current (No changes)</span> Purchase limit <input type="checkbox"/> Purchase limit: Remark <input type="checkbox"/> Process: Send email <input type="checkbox"/> Process: Everyone <input type="checkbox"/>	Step status term <span style="float: right;">Processed</span> Level / Division <span style="float: right;">Division</span> <span style="float: right;">Person</span> Assign: Remark <span style="float: right;">No</span> Next: Account(Status) <span style="float: right;">Current (No changes)</span>

Check/Enable the option based on which action/process step you want to inform the person by email that they have received a new request in their workflow.

Once the setup is completed and all is setup correct the user will receive the following standard email message.



In case the email is not received any error can be checked via System / Reports / Log / Errors

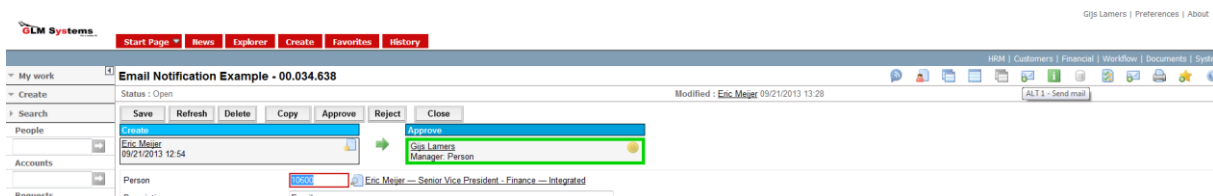


## 4.6 Email

The standard request functionally has the option to send an email via outlook but the attachments or attachments linked to a document can't be attached to the email. The email feature allows for sending an email directly from the request without having outlook and also has the option to include attachments related to the request if needed.

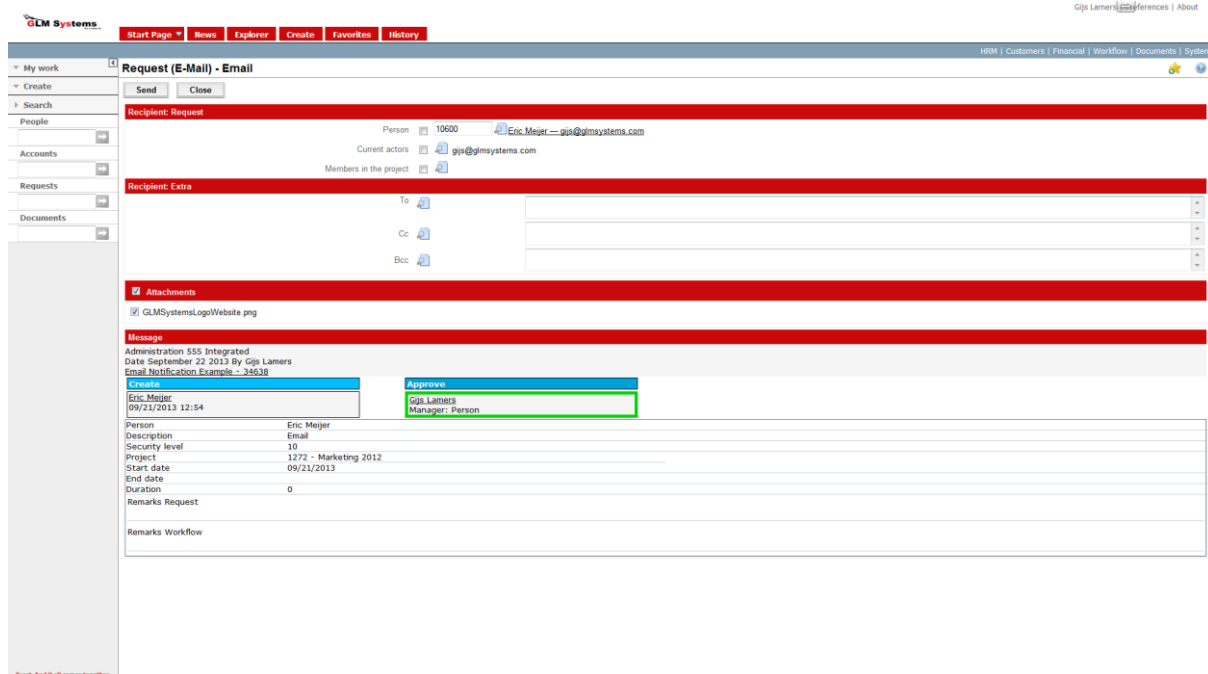
For the setup of the email server to be used see 3.4 Email notifications.

In the request there is a new email icon toolbar button in the request. When clicking this button it will redirect you to a new screen from where you can send the email.



In the screen you have the option to select the email from a person, current actions and / or project members.

The other option is to select any email from Synergy or entering the email manually.



**Request (E-Mail) - Email**

Send Close

**Recipient: Request**

Person: 10620 Eric Meijer — gja@glm.com

Current actors: gja@glm.com

Members in the project: gja@glm.com

**Recipient: Extra**

To: [Field]

Cc: [Field]

Bcc: [Field]

**Attachments**

☒ GLMSystemsLogoWebsite.png

**Message**

Administration 555: Integrated  
 Date September 22 2013 By Gja Lammers  
 Email Notification Example - 34638

Person	Description	Security level	Project	Start date	End date	Duration	Remarks Request	Remarks Workflow
Eric Meijer	10	1272 - Marketing 2012	09/21/2013		0			

Approve: Gja Lammers Manager: Person

## 4.7 Purchase Limit


In the standard request type definition at the approve stage you have the option to enable the purchase limit check. The purchase limit set at the resource card will be checked against the amount in the request. In case the amount in the request is above the purchase limit of the person it will look for the next person who has a high enough limit to approve.

The purchase limit feature now also enables this option for the realize stage and the process stage. In the request definition there are five extra options:

- Approve - Purchase limit: remark
- Realize - Purchase limit
- Realize - Purchase limit: remark
- Process - Purchase limit
- Process - Purchase limit: remark

When enabling this feature you can enable the purchase limit check also for the workflow realize and process step.

The purchase limit check has additional features which are not available in the standard purchase limit check. When a role is used and there is nobody in a role level with a high enough limit it will look at a higher level. For example in the division there is no person within the role with a high enough purchase limit then it will look for a person with the same role at group level.



Start Page
News
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[Gips Lamer](#)
[Preferences](#)
[About](#)

My work

Create

Search

People

Accounts

Requests

Documents

Next: Account(Type) Current (No changes)  
 Purchase limit: Remark ☐  
 Approve: Send email ☐  
 Rejected: Send email ☐  
 Approved: Send email ☐  
 Approve: Everyone ☐

Next: Account(Status) Current (No changes)

---

**Who can realize the request?**

Step action term Realize  
 Person   
 Role   
 Assume: Ownership Current  
 Assign: Ownership No  
 Next: Account(Type) Current (No changes)  
 Purchase limit ☐  
 Purchase limit: Remark ☐  
 Realize: Send email ☐  
 Realize: Everyone ☐

Step status term Realized  
 Level / Division Division Person  
 Assign: Remark No  
 Next: Account(Status) Current (No changes)

---

**Who can process the request?**

Step action term Process  
 Person   
 Role   
 Assume: Ownership Current  
 Assign: Ownership No  
 Next: Account(Type) Current (No changes)  
 Purchase limit ☐  
 Purchase limit: Remark ☐  
 Process: Send email ☐  
 Process: Everyone ☐

Step status term Processed  
 Level / Division Division Person  
 Assign: Remark No  
 Next: Account(Status) Current (No changes)

---

**Who can reopen the request once it is completed?**

Reopen Last  
 Role

Level / Division Division Person

---

**Who can reject the request?**

Next: Account(Type) Current (No changes)

Next: Account(Status) Current (No changes)

---

**Who can delete the request?**

Creator ☐  
 Role

Manager: Item ☐  
 Level Division

Exact. And it all comes together.

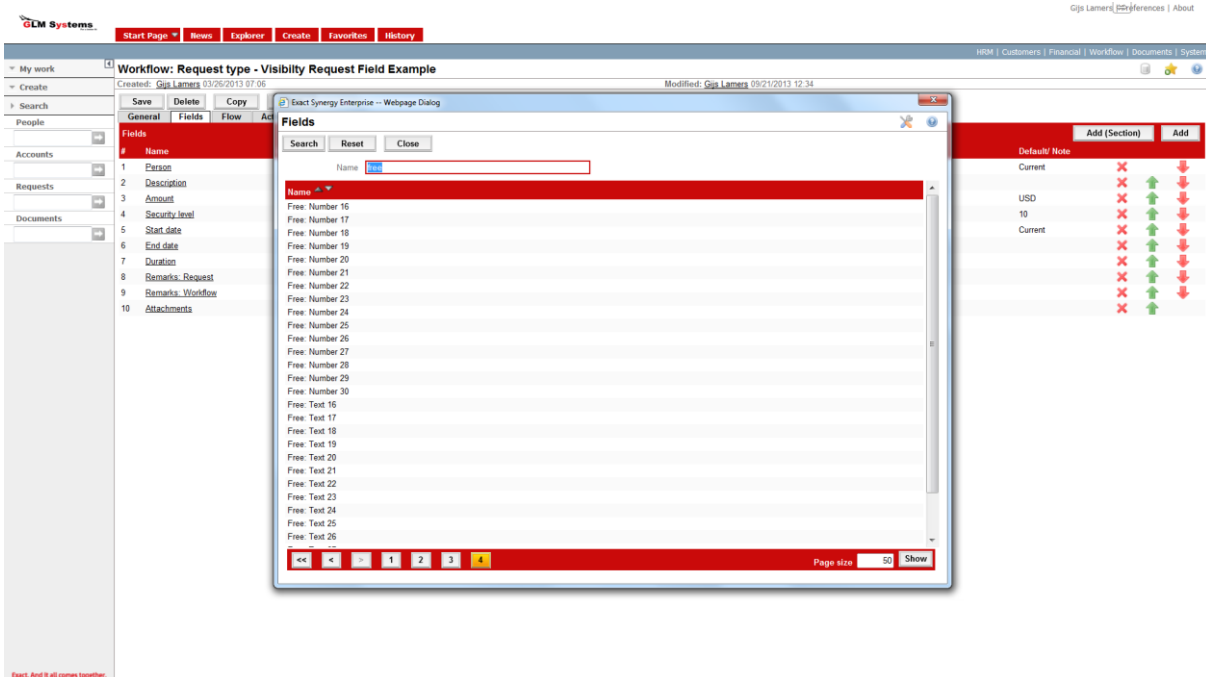
## 4.8 Free fields

### 4.8.1 Additional Free Fields

Standard there are a limit set of free fields these free fields have been extended. All of the free field types have no 30 free fields with the same features as a standard free field:

- 50 free text fields
- 50 free guid fields
- 50 free number fields
- 50 free yes/no fields
- 50 free amount fields
- 50 free date fields
- 10 free comment fields

These fields are available are also available to use in a standard workflow search or Pivot Analysis Views.



The screenshot displays the GLM Systems Exact Synergy Enterprise Workflow Plus interface. A 'Fields' dialog box is open, showing a list of 30 free fields. The fields are categorized into two groups: Number fields and Text fields. The Number fields are labeled 'Free: Number 16' through 'Free: Number 25'. The Text fields are labeled 'Free: Text 16' through 'Free: Text 25'. The dialog box has a search bar and a 'Show' button. The background shows a workflow configuration screen for 'Request type - Visibility Request Field Example'.

Freezing of Free Fields (such as Freeze Everyone) may now be done for Multiple Type Requests, for our 10 Free Comment Field. This is not possible using Exact's two comment fields (Remarks: Request or Remarks: Workflow).

For the free comment fields additional settings are available to show the remark section on top (Comment above freeze) and to save the remarks in descending order (Add latest comment on top) so that the last remarks will be shown first.

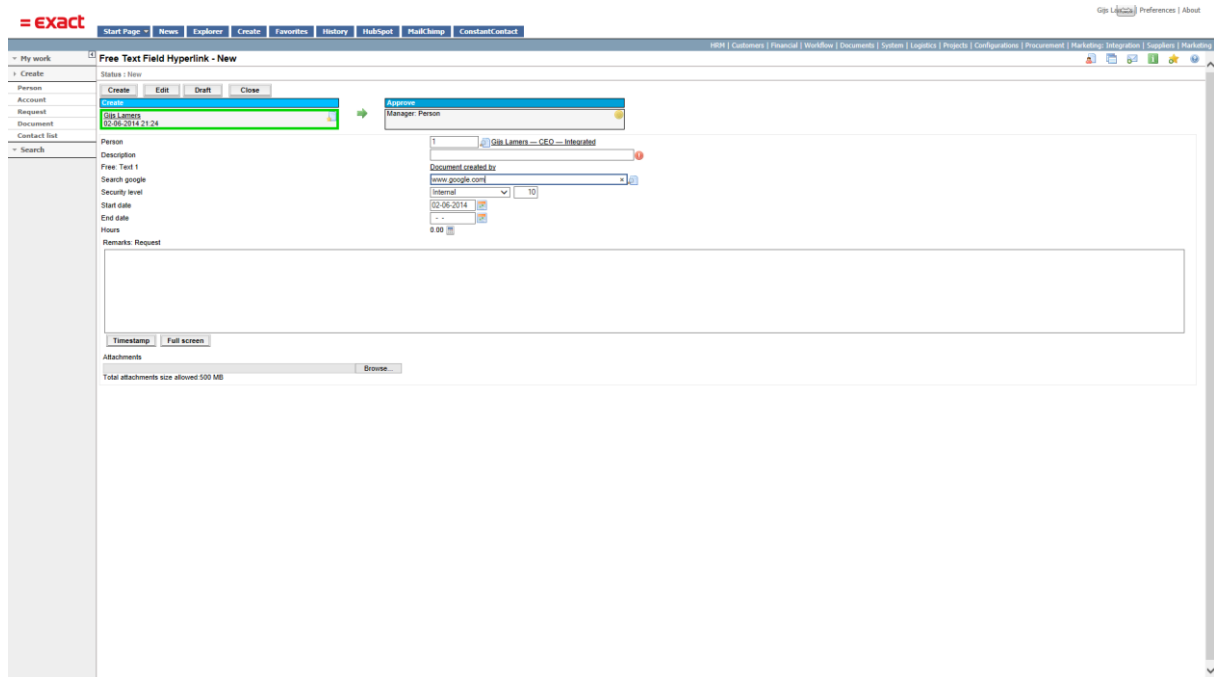
#### 4.8.2 Free text fields: hyperlink / url

With the free text field: hyperlink feature it is possible to have a url in your text field and via a button this url can be opened.

The url parameters can be from other fields in the request. A possible use could be that one of the request fields has the tracking number of a package and the hyperlink is using this value as parameter to open the website which tracks the package.

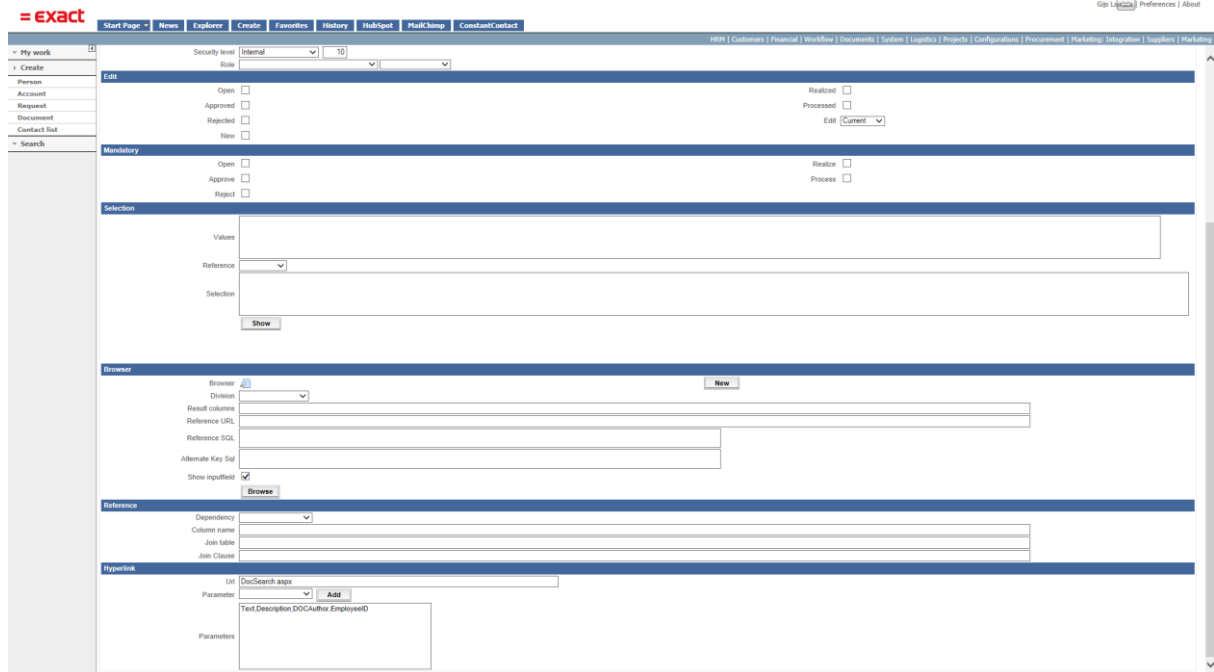
The hyperlink can be to an external website outside of Synergy or can be a webpage in Synergy.

When the user enters a valid url in the text field and hits enter, tab or moves to the next field a button will appear behind the text field.



The screenshot displays the 'Free Text Field Hyperlink - New' form within the Exact Synergy Enterprise Workflow Plus application. The interface includes a top navigation bar with tabs like 'Start Page', 'News', 'Explorer', 'Create', 'Favorites', 'History', 'HubSpot', 'MailChimp', and 'Constant contact'. A left sidebar shows a 'My work' section with a search bar and a list of items including 'Person', 'Account', 'Request', 'Document', 'Contact list', and 'Search'. The main form area has a 'Status: New' indicator and buttons for 'Create', 'Edit', 'Draft', and 'Close'. Below these, there are fields for 'Request' (containing 'Gis Lammert'), 'Document' (containing '02-06-2014 21:24'), and 'Person' (containing 'Gis Lammert'). A 'Manager: Person' dropdown is also visible. The 'Description' field contains 'Free Text 1'. The 'Search google' field has a dropdown menu showing 'www.google.com'. The 'Security level' is set to 'Internal' with a value of '10'. The 'Start date' is '02-06-2014' and the 'End date' is '-'. The 'Hours' field is '0:00'. A 'Remarks: Request' section is present with a large text area. At the bottom, there are 'Timestamp' and 'Full screen' buttons, an 'Attachments' section with a 'Browse...' button, and a note 'Total attachments size allowed 500 MB'.

In the request field definition a new section for the hyperlink feature is added



**Url:** The url for the hyperlink, when the text field is set to read only and the default text is set the hyperlink will show the default text but when clicked it will go to the entered url.

**Parameter:** A list of available fields in the request type which can be used as input parameter. By clicking the add button the selected field will be added to the parameters.

**Parameters:** Parameters to be used by the url. Format is [URL Parameter name 1],[Request field name 1]; [URL Parameter name 2],[Request field name 2].

Example:

Text,Description;DOCAuthor,EmployeeID

In the above screenshot that would mean that when the hyperlink is clicked it will open the document search screen with the Text and Created by already entered based on the values in the request.

## 4.9 Browse fields

Free fields can be changed to use a predefined browser in the system or a newly created browser. This browser can browse on data in Synergy or on data in Exact Globe or Exact Macola ES. Currently free fields are limited on the data that can be browsed on and the back office data can't be browsed.

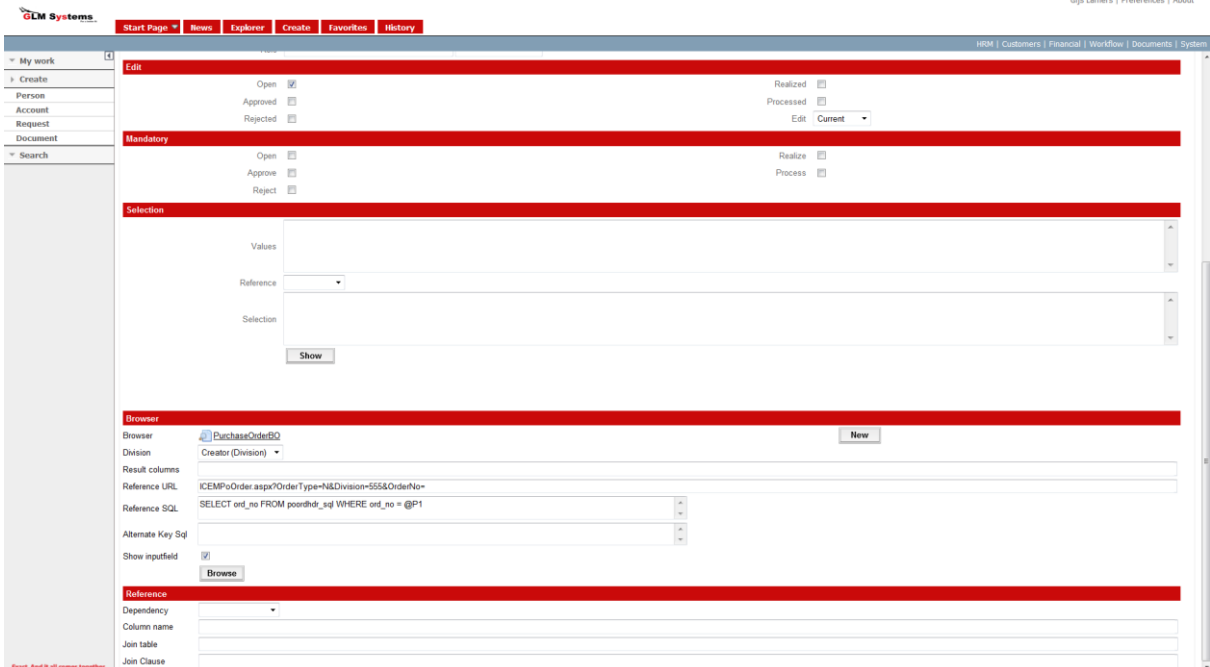
Free text fields: Items, Project and tax codes

Free number fields: People and assortments

Free guid fields: Request, Documents, Accounts, Contacts, Transactions and items

By making use of existing system browsers all data in Synergy can be selected via a browser in a request. You also can create your own browser in case the browser you would like is not available.





For a free request field of type text, guid and number the following additional fields are available to select a browser

**Browser:** The browser to be used for this field. The browser can be selected from a list of browsers. The first browsers displayed are a number of standard system browsers and your own custom defined browser. After these browsers all browsers available in the repository are displayed.

**Division:** The field which will determine the division to be used for the browser. The following options are available

- Creator (Division): the division of the creator will be used for the browser
- Person (Division): the division of person selected in the person field will be used for the browser
- Current (Division): the division of the user currently logged in will be used for the browser
- Division: the division used for the browser is based on the division field 'division 2'

**Result columns:** The result columns are the normally two columns in the table with the first column being the key value (the value which will be stored when saving the request) and the description column which is used to display the description and/or hyperlink of the browser. The result columns field is also available in the browser maintenance when already filled in as required at the browser this doesn't need to be entered again.

**Reference URL:** The application which should be opened when clicking the hyperlink right of the browser.

**Reference SQL:** When a different reference / description should be displayed a query can be entered here which will get the reference value.  
 The query will be similar to `SELECT cmp_name FROM cicmpy WHERE cmp_wnn = @P1`. Where `cmp_name` is the description which will be displayed and `cmp_wnn` is the key the `@P1` will be automatically replace by the actual value.

**Alternate Key SQL:** This query will be used in case a different key value should be used.

**Show input field:** The checkbox show input field is to determine if the input field before the browser should be shown. When unchecked the input field is not shown.

**Browse (button):** The browse button will redirect to an application where the browser can be tested.

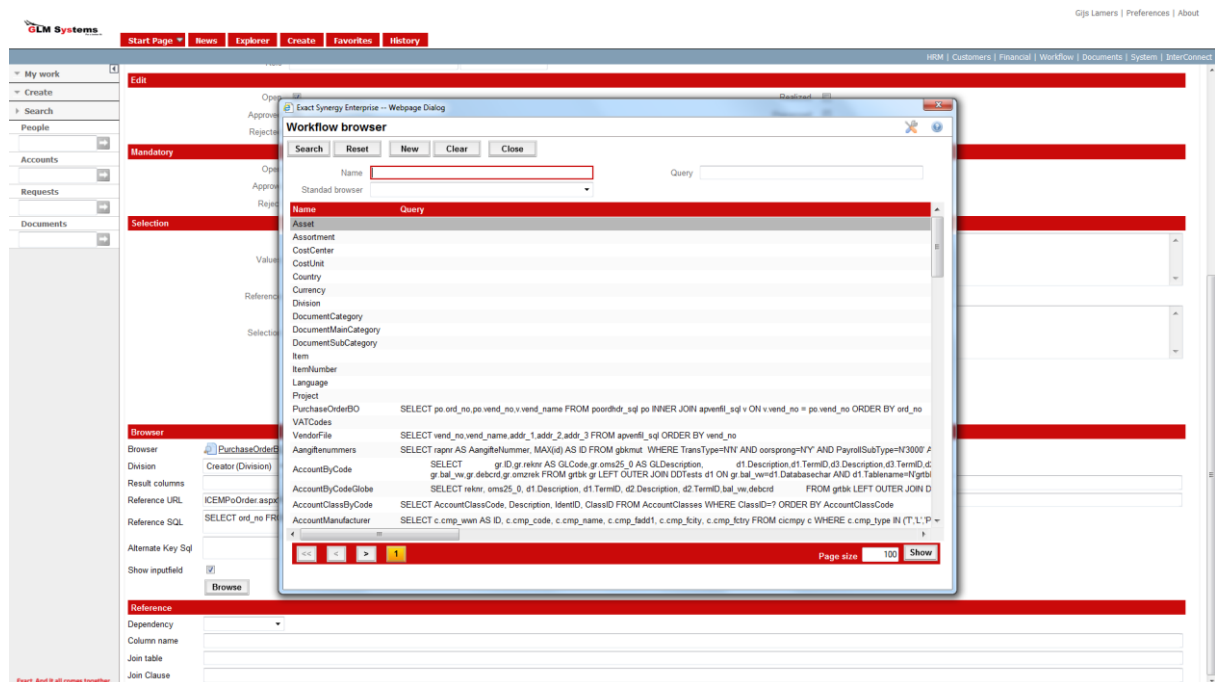
When browsing on the available browser you will see the following workflow browser with the columns Name, Query and Standard browser

Name: the name of the browser

Query: the query used in the browser

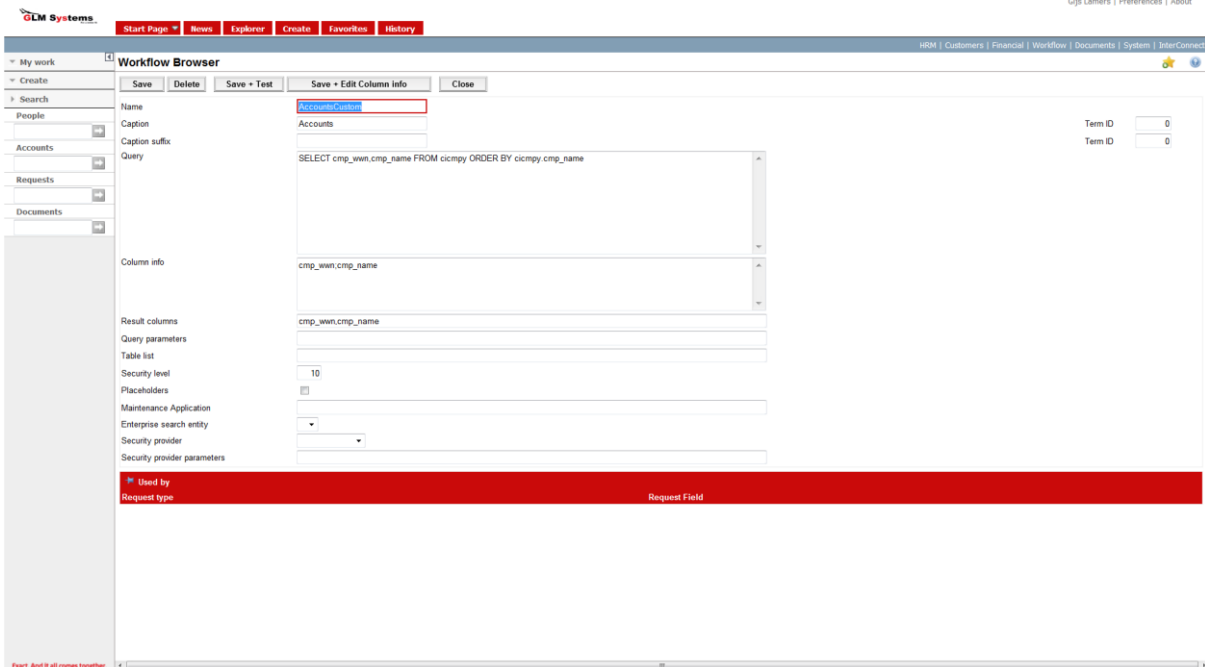
Standard browser: is the browser a standard browser in the repository (yes/no)

In Synergy there are a number of standard system browser which are defined those are the browsers where the query column value is empty.



#### 4.9.1 Creating a new browser

In the request field at the browser section there is also a new button which will redirect you to the application to create your own browser.



**Name:** This is the name of the browser, it is used in the source and repository to define the browser to use.

**Caption:** The caption show in the browser. **TermID:** The term id of the caption.

**Query:** This is the query the browser uses. (You can use parameters, in that case also **Query parameters** must be filled).

**Column info:** This is the definition on how to show the columns, this will be filled when choosing **Save + edit column info**.

**Result columns:** This defines the columns the browser returns to the code.

**Query parameters:** This list the parameters used by the query.

**Table list:** This is a list of the tables used in the browser query.

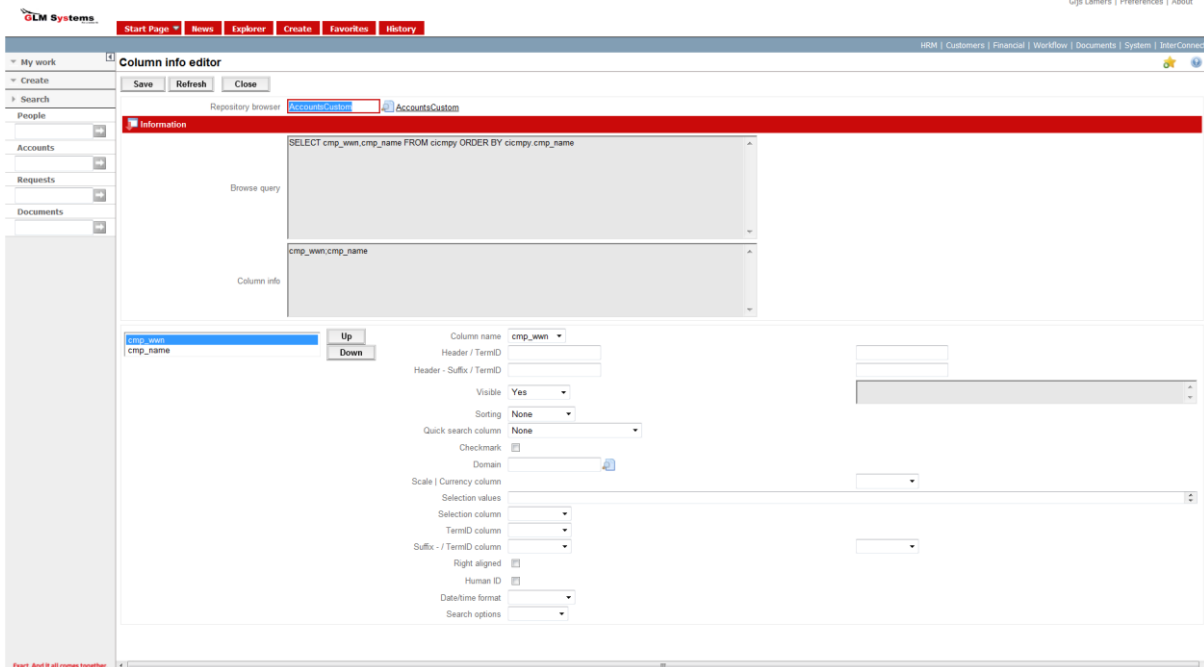
**Security level:** The security level the user has to have to use the browser

**Maintenance Application:** The maintenance application to start if the user presses the **New** button in the browser.

**Enterprise search entity:**

**Security provider:** security definition for the browser

**Security provider parameters:** the parameters for the security definition



The screenshot shows the 'Column info editor' window. On the left is a sidebar with navigation links. The main panel has a 'Repository browser' at the top showing 'AccountsCustom'. Below it is an 'Information' section with a SQL query: `SELECT cmp_wen_cmp_name FROM cicmpy ORDER BY cicmpy_cmp_name`. The 'Column info' section contains various configuration options for the column 'cmp\_name', including 'Column name', 'Header / TermID', 'Header - Suffix / TermID', 'Visible', 'Sorting', 'Quick search column', 'Checkmark', 'Domain', 'Scale | Currency column', 'Selection values', 'Selection columns', 'TermID column', 'Suffix - / TermID column', 'Right aligned', 'Human ID', 'Date/time format', and 'Search options'.

In the left list box you can change the order of the columns. On the right you can configure the properties per column, remember to choose the column in the combo box.

**Header / TermID:** This is the caption and term id of the column.

**Header - Suffix / TermID:** This is the suffix and suffix term id of the column.

**Visible:** This is to set columns visible or hidden.

**Sorting:** This field is for enabling sorting on the column.

**Quick search column:** This field is to enable the column for searching in the browser.

**Checkmark:** This field is to change a 0 or 1 value from the database to a checkmark in the browser

**Domain:** This field is to select the repository domain to be used. This will determine the way the column is displayed and the length which can be entered for the input field related to the browser.

**Scale | Currency column:** The currency the display for an amount where the currency is available in another column.

**Selection values:** This field can be used to predefine the selection values of the column (used in the quick search).

**Selection columns:**

**TermID column:** The term id of the value in the result. This can be used when this is a status field which has value like 'A' (active), 'P' (proposed). Where the database value will be 'A' but the value you want to be displayed in the browser should be 'Active'.

**Suffix/TermID column:** The suffix termed of the value in the result

**Right aligned:** This is to right align string fields.

**Human id:** Show the result as a Human id. This can be used for the request Id where in the database the value is 15367 which will then be displayed as 15.367

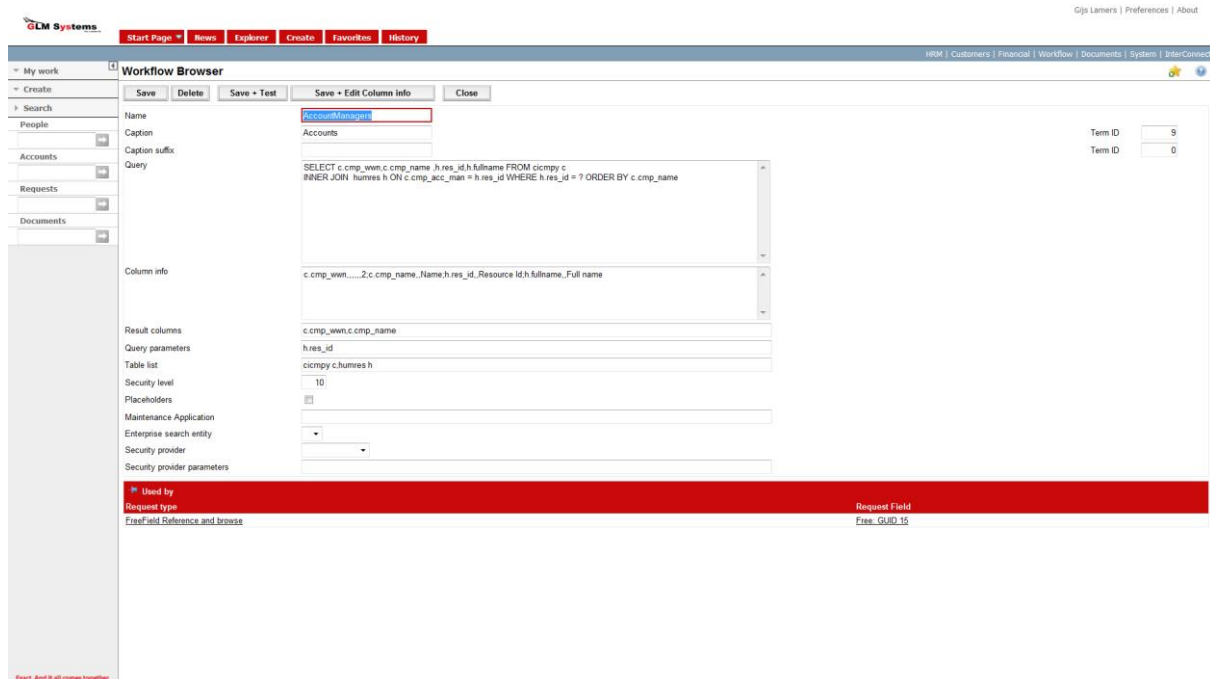
**Date/time format:** The format in which the date / time field should be displayed.

**Search option:** This is to configure the search operator used in the quick search.

After the query is created it can be selected in the free field. The new browser can only be selected in the free field type which is the same as the browser key type. In the case where we make a browser on the accounts table (cicmpy) and the key used is cmp\_wwn where the type is a guid (uniqueidentifier) the browser is only available in the request free guid fields. When saving the browser it will open the test application to test the browser

#### 4.9.2 New browser: Accounts per manager

The following example will show all accounts where the person in the request is the account manager.



The screenshot shows the 'Workflow Browser' window in the GLM Systems application. The 'Name' field is set to 'Accounts'. The 'Caption' is 'Accounts' and the 'Caption suffix' is empty. The 'Query' field contains the following SQL: `SELECT c.cmp_wwn,c.cmp_name ,h.res_id,h.fullname FROM cicmpy c INNER JOIN humres h ON c.cmp_acc_man = h.res_id WHERE h.res_id = ? ORDER BY c.cmp_name`. The 'Column info' field contains: `c.cmp_wwn,,,,,2;c.cmp_name,,Name;h.res_id,,Resource Id;h.fullname,,Full name`. The 'Result columns' field contains: `c.cmp_wwn,c.cmp_name`. The 'Query parameters' field contains: `h.res_id`. The 'Table list' field contains: `cicmpy c,humres h`. The 'Security level' is set to 10. The 'Placeholders' field is empty. The 'Maintenance Application' is set to 'Enterprise search entity'. The 'Security provider' is set to 'Security provider parameters'. The 'Used by' section shows 'Request type' as 'FreeField Reference and browse' and 'Request field' as 'Free GUID 10'.

First create a new browser we will **name** the browser AccountManagers, the name of the browser which is displayed when browsing is 'Accounts'. The **term ID** 9 for accounts can be found by looking for the term via System – Setup – Terms – Search

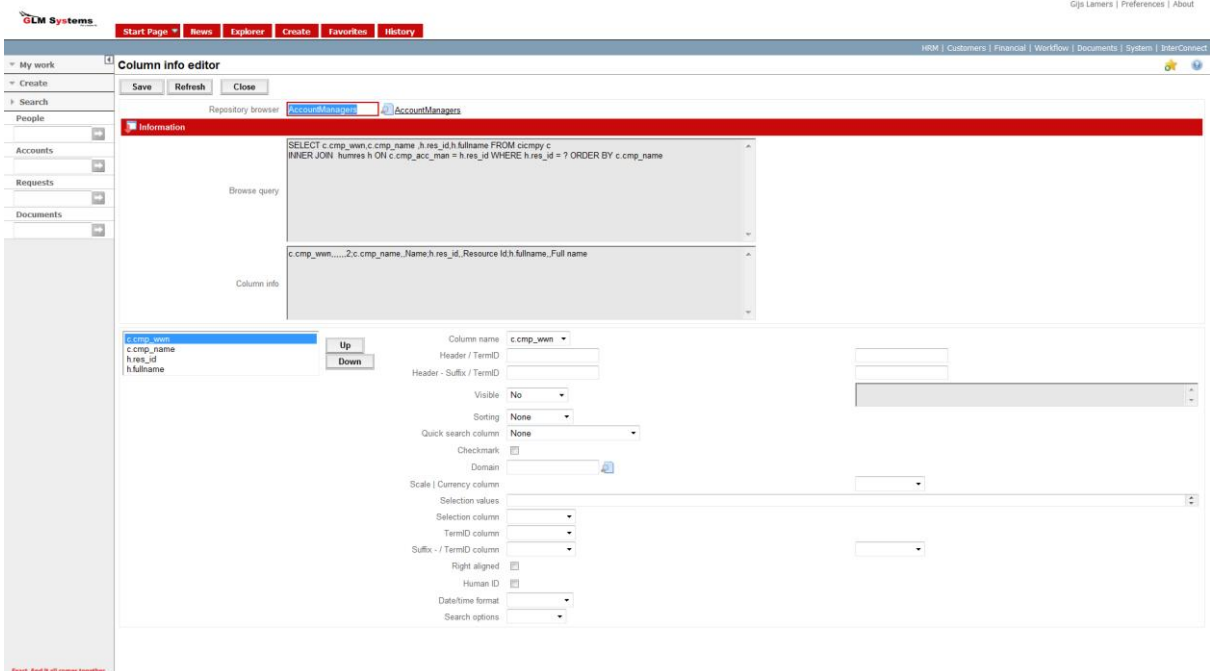
The **Query** 'SELECT c.cmp\_wwn,c.cmp\_name ,h.res\_id,h.fullname FROM cicmpy c INNER JOIN humres h ON c.cmp\_acc\_man = h.res\_id WHERE h.res\_id = ? ORDER BY c.cmp\_name' will look for the accounts and the account manager which is linked to the account. The ? is the parameter which need to be supplied for the browser.

The **Column info** 'c.cmp\_wwn,,,,,2;c.cmp\_name,,Name;h.res\_id,,Resource Id;h.fullname,,Full name' can be maintained via the 'Save + Edit Column info'. Before clicking on the 'Save + Edit Column Info' each of the columns already need to be entered manually in the Column info field. The columns are separated by a ';'. So initially the column info will look like 'c.cmp\_wwn;c.cmp\_name;h.res\_id;h.fullname'

The **Result columns** 'c.cmp\_wwn,c.cmp\_name' are the key and the description which should be shown at the browser, the fields are separated by a ','.

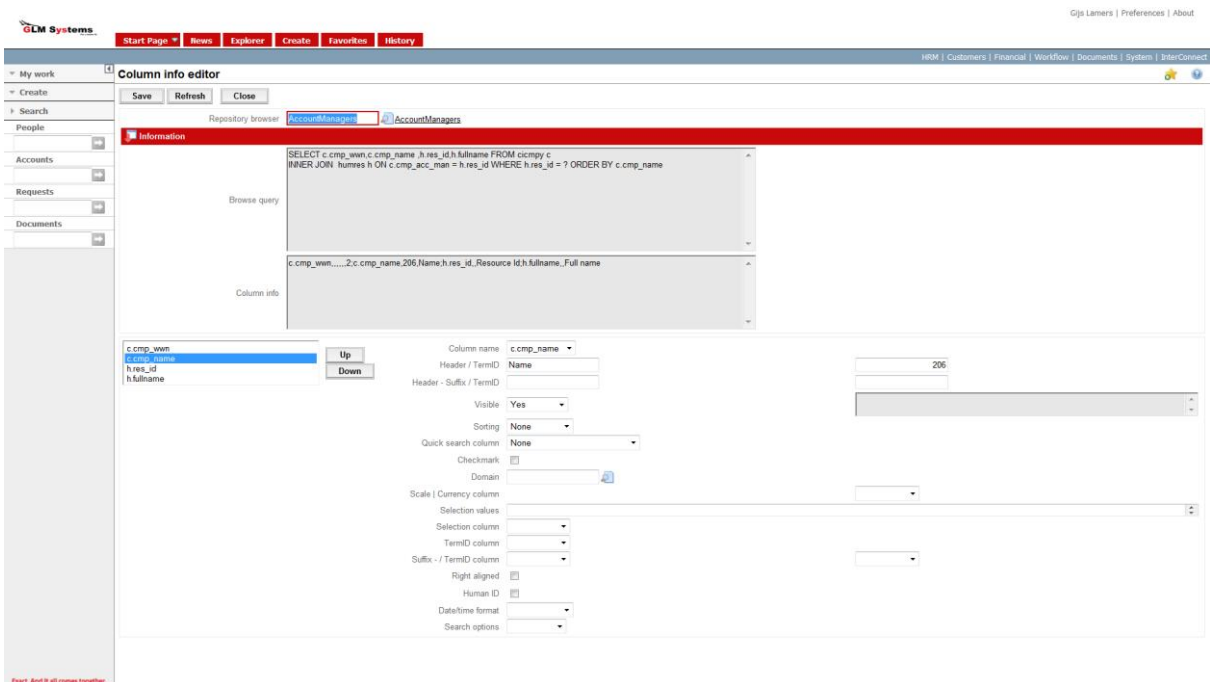
The Query Parameters 'h.res\_id' is the list of columns which require a parameter.

The **Table list** 'cicmpy c,humres h' is the list of tables in the query including the alias if used, separated by a ','.



When clicking 'Save + Edit column info' the above screen is shown. To switch between the columns you can select the columns from the column list displayed on the right.

For the c.cmp\_wmn column we set the Visible to 'no' as we don't want to see the guid / uniqueidentifier in the result. For the c.cmp\_name column we change the Header / TermId to 'Name' and '206' which is the term id for Name.



Once created you can select the browser in any free guid field.

**Browser**

Browser:  New

Division:

Dependency:

Result columns:

Reference URL:

Reference SQL:

Alternate Key Sql:

Show inputfield: ☐

Browse

Because the browser has a parameter an additional field **Dependency**: h.res\_id is shown with a drop down box of available fields in the request where the value for the parameter should come from. In this case we select the request field person.

The **Result columns** is empty as this is already entered in the browser.

**Reference URL** 'CRMAccountCard.aspx?BCAction=1&ID=' is the link which will display after the browser. In this case the link will start up the account card. The ID will be filled automatically based on the selected account.

**Reference SQL** is empty as the reference sql will be build up automatically based on the browser details. There could be cases when using a standard browser you will get a query error in that case you can define your own query. For the AccountManagers browser that query would look like 'SELECT c.cmp\_name FROM cicmpy c WHERE c.cmp\_wnn=@P1'. The @P1 parameter will be automatically replace by the account id.

**Show inputfield** the show inputfield is automatically unchecked because the browser has a guid as key.

The result in a request will look like

Gijs Lamers | Preferences | About

GLM Systems Start Page News Explorer Create Favorites History

My work **FreeField Reference and browse - 00.034.643** Modified - Gijs Lamers 09/24/2013 12:43

Status: Open Save Refresh Delete Copy Approve Reject Close

Search People Accounts Requests Documents

Person:  Approve Close

Description: test Internal 10

Start date: 09/22/2013 End date 0.00

Remarks: Request

Timestamp Full screen

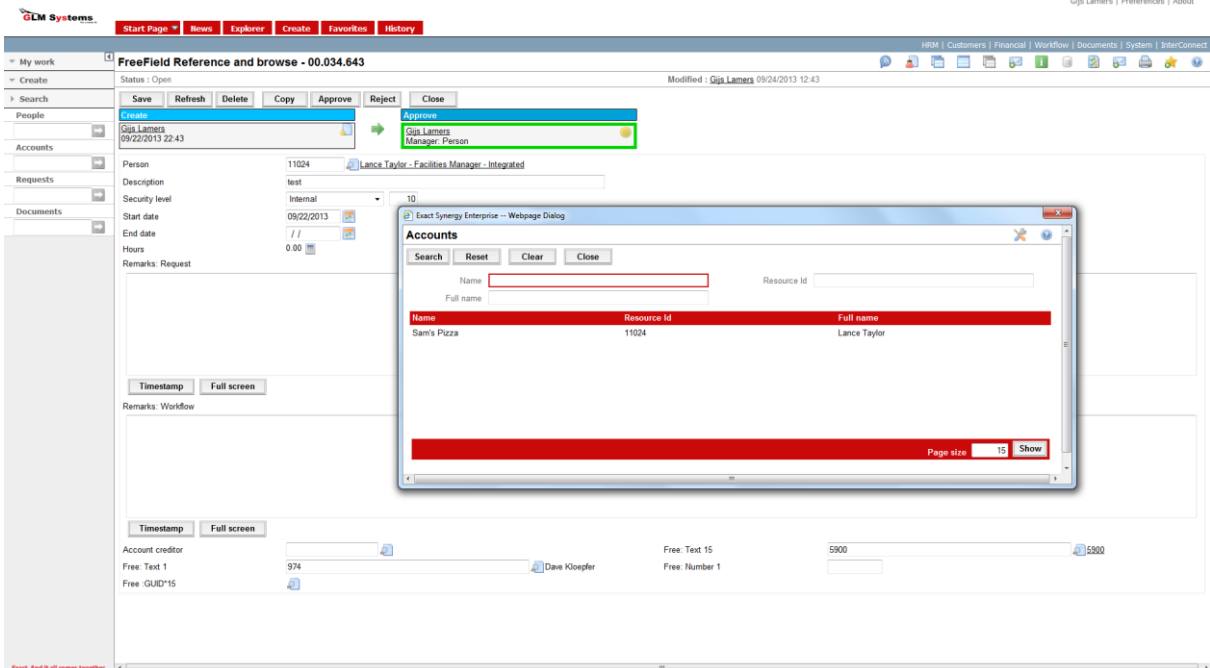
Account creditor: 974 Free Text 1 Free GUID\*15 AT&T Corporation

**Accounts** Search Reset Clear Close

Name	Resource Id	Full name
AAA Pet Supply Dist	1	Gijs Lamers
ABC Consulting Services	1	Gijs Lamers
ABC Liquors	1	Gijs Lamers
Acme Materials	1	Gijs Lamers
Acme Printing	1	Gijs Lamers
American Electric Power	1	Gijs Lamers
AT&T Corporation	1	Gijs Lamers
Automated Engrg Svcs Corp	1	Gijs Lamers
Brett Co	1	Gijs Lamers
Compagnolo Manufacturer	1	Gijs Lamers
Cycle Scene	1	Gijs Lamers
Demo Customer (Projects)	1	Gijs Lamers
Den Bike South	1	Gijs Lamers
Heritage Leasing	1	Gijs Lamers
Involute Trading Company	1	Gijs Lamers

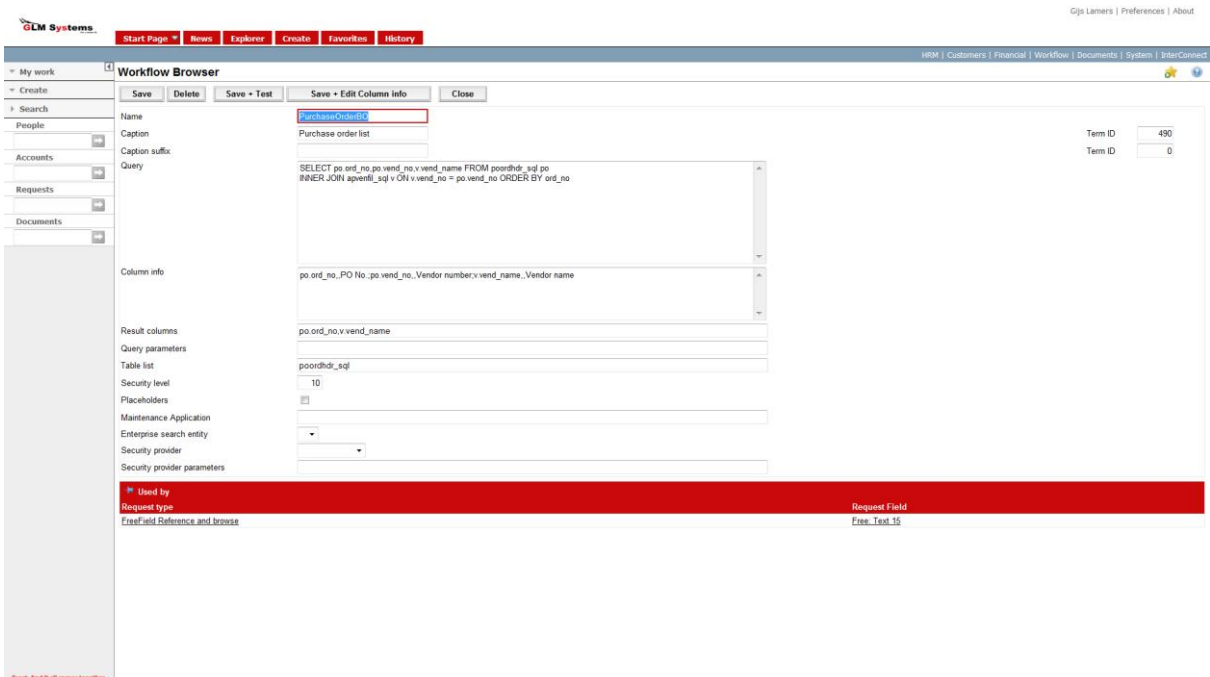
Page size: 15 Show

When changing the person selected in the request the browser data displayed will also change



#### 4.9.3 New browser: Purchase orders from Macola back office

The following example will show the purchase orders directly from the Exact Globe Macola database.



First create a new browser we will **name** the browser PurchaseOrderBO, the name of the browser which is displayed when browsing is 'Purchase order list'. The **term ID** 490 for purchase order list can be found by looking for the term via System – Setup – Terms – Search

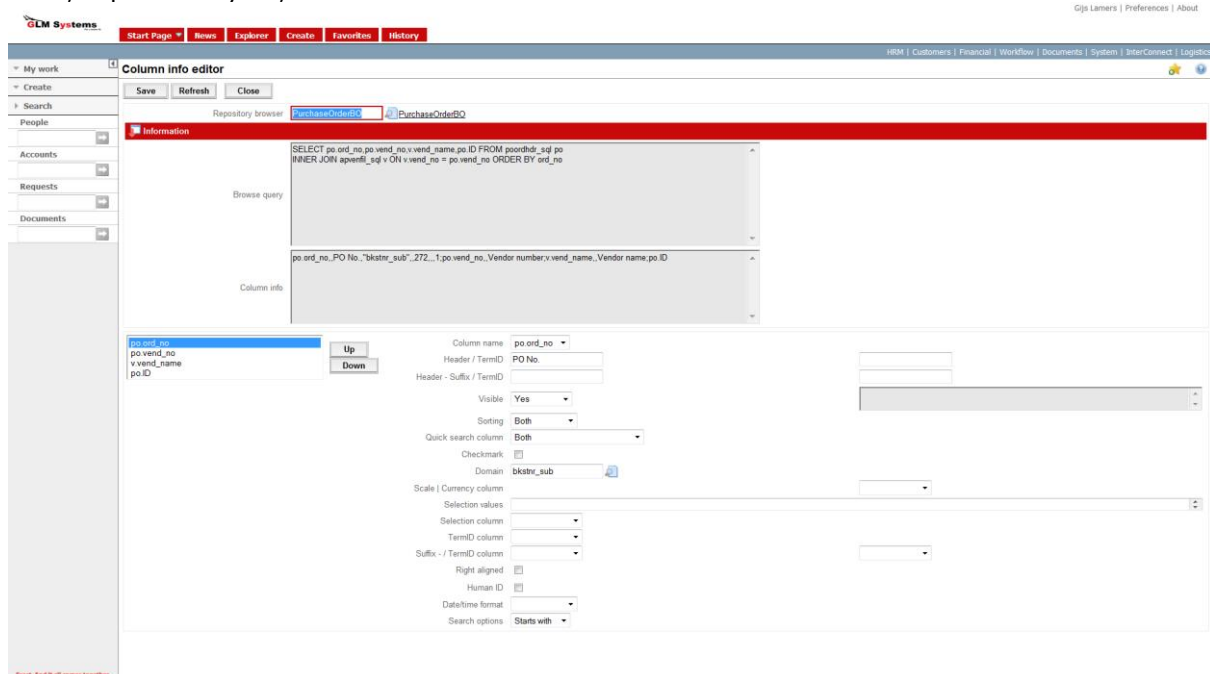


The **Query** 'SELECT po.ord\_no,po.vend\_no,v.vend\_name FROM poordhdr\_sql po INNER JOIN apvenfil\_sql v ON v.vend\_no = po.vend\_no ORDER BY ord\_no' will look for the purchase orders in the Macola purchase order table as additional information the vendor name is also added to the query by joining the vendor table to the purchase order table.

The **Column info** 'po.ord\_no,,PO No.;po.vend\_no,,Vendor number;v.vend\_name,,Vendor name' can be maintained via the 'Save + Edit Column info'. Before clicking on the 'Save + Edit Column Info' each of the columns already need to be entered manually in the Column info field. The columns are separated by a `;`. So initially the column info will look like 'po.ord\_no; po.vend\_no; v.vend\_name'

The **Result columns** 'po.ord\_no,v.vend\_name' are the key and the description which should be shown at the browser, the fields are separated by a `;`.

The **Table list** 'poordhdr\_sql po,apvenfil\_sql v' is the list of tables in the query including the alias if used, separated by a `;`.



When clicking 'Save + Edit column info' the above screen is shown. To switch between the columns you can select the columns from the column list displayed on the right.

The **Quick search column** is set to 'Both'. When the quick search column is not set and the purchase order number is entered manually it can't be found.

The **Domain** is set to 'bkstnr\_sub'. The domain will determine the length of the field in this case the bkstnr\_sub length is 8 which means the for the order number field the length is also 8. When the domain is not set the length will be the default length of the free text field.

Once the browser is created you can select the browser in any free text field as the browser key `ord_no` is a field of type text.

Browser	
Browser	<input type="text" value="PurchaseOrderBO"/> <span style="float: right;">New</span>
Division	Creator (Division) ▼
Result columns	po.ord_no,po.ord_no,v.vend_name
Reference URL	ICEMPoOrder.aspx?OrderType=N&Division=@Division&OrderNo=
Reference SQL	SELECT ord_no,v.vend_name FROM poordhdr_sql INNER JOIN apvenfil_sql v ON v.vend_no = po.vend_no WHERE LTRIM(RTRIM(ord_no)) = @P1
Alternate Key Sql	
Show inputfield	<input checked="" type="checkbox"/> <span style="float: right;">Browse</span>

The **Division** we will set to Creator (division). This means that the browser on the purchase orders will use the division of the creator of the request.

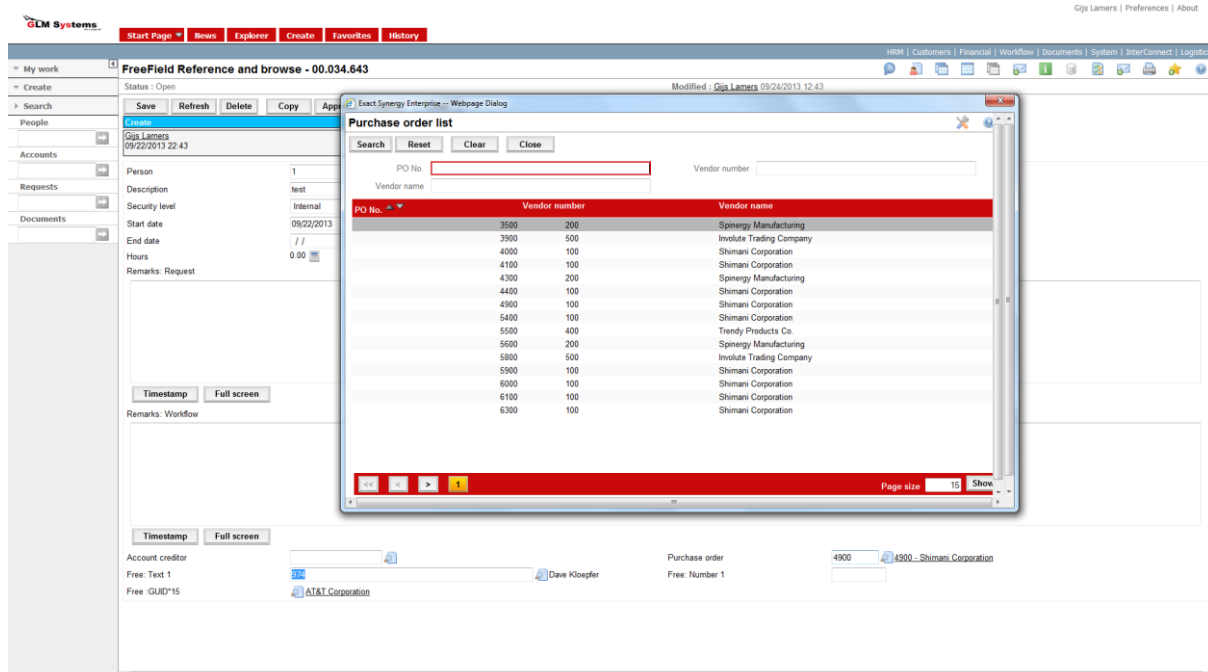
The **Result columns** we will give the value 'po.ord\_no,po.ord\_no,v.vend\_name' this will overwrite the value given in the browser. The first column po.ord\_no is used for the key, the two other columns po.ord\_no and v.vend\_no are used in the reference / link.

**Reference URL** 'ICEMPoOrder.aspx?OrderType=N&Division=@Division&OrderNo=' is the link which will display after the browser. In this case the link will start up the Interconnect purchase order application. The parameter @Division will automatically be replaced by the division of the creator. The OrderNo will be filled automatically based on the selected account.

**Reference SQL** 'SELECT ord\_no,v.vend\_name FROM poordhdr\_sql po INNER JOIN apvenfil\_sql v ON v.vend\_no = po.vend\_no WHERE LTRIM(RTRIM(ord\_no)) = @P1'. The @P1 parameter will be automatically replaced by the order number.

**Show inputfield** the show inputfield is checked and the order number also can be entered by the user.

The result in a request will look like



PO No.	Vendor number	Vendor name
3500	200	Spenergy Manufacturing
3500	500	Involute Trading Company
4000	100	Shimani Corporation
4100	100	Shimani Corporation
4300	200	Spenergy Manufacturing
4400	100	Shimani Corporation
4500	100	Shimani Corporation
5400	100	Shimani Corporation
5500	400	Trendy Products Co.
5600	200	Spenergy Manufacturing
5800	500	Involute Trading Company
5900	100	Shimani Corporation
6000	100	Shimani Corporation
6100	100	Shimani Corporation
6300	100	Shimani Corporation

#### 4.9.4 Existing browser: Sales order back office Exact Globe

A new free text field is added to the request and the standard browser SalesOrder is selected. The division from which the browser will get the data is based on the person division.

Browser


Browser New  
 Division Person (Division) ▼  
 Result columns  
 Reference URL LogOrderBO.aspx?Type=V&Division=@Division&Number=  
 Reference SQL  
 Alternate Key Sql  
 Show inputfield ☒

Browse

When opening the browser the browser details can't be changed as this is a standard browser. The information can only be viewed.

The standard browser result column is `ordernr` in this case we change this by setting the **Result columns** to `ordernr, refer` in the request field definition. Without changing the reference / link will display the `ordernr` with the change it will display the sales order description.

The **Reference URL** is set to `'LogOrderBO.aspx?Type=V&Division=@Division&Number='` which is the application to open the sales order from the Exact Globe backoffice in Synergy.


Start Page | News | Explorer | Create | Favorites | History

GJM Lamers | Preferences | About

Workflow Browser

Test
Column info
Close

Name	Caption	Term ID
SalesOrder	Sales Order	8783
ord_soor	ord_soor	0

Query  

```
SELECT ID, ordernr, ordstat, fakdebrn, refer, docnumber, afkdat, ord_debtor_name, inv_debtor_name FROM orkng WHERE
ord_soor IN (RV) ORDER BY ordernr
```

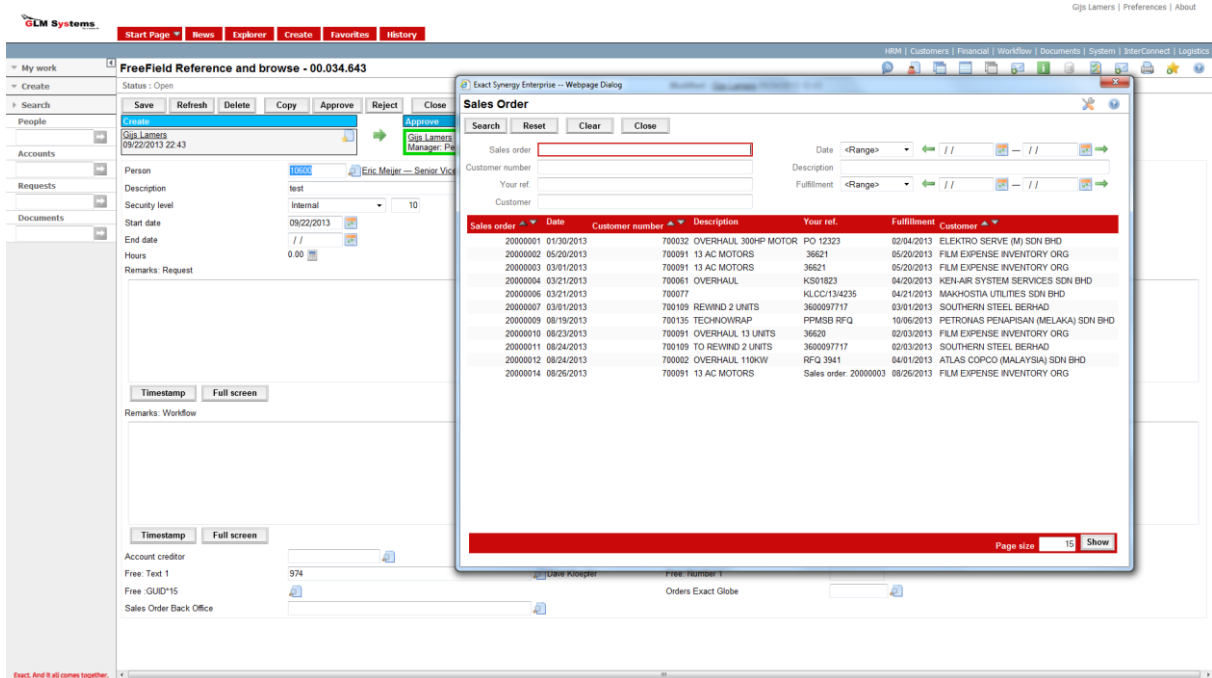
Column info  

```
ID .....1, ordernr, 3996, SalesOrderNumber, 272, 1, ordstat, 0, SalesOrderDate, fakdebrn, 0, InvoiceDebtor, 272, 1, refer, 4243, Des
cription, docnumber, 79, YourRef, afkdat, 0, DeliveryDate, ord_debtor_name, 1, 1, inv_debtor_name, 1, 1
```

Result columns  
 Query parameters  
 Table list  
 Security level  
 Placeholders  
 Maintenance Application  
 Enterprise search entity  
 Security provider  
 Security provider parameters

Used by  
 Request type  
 Request field

In a request this browser will look like



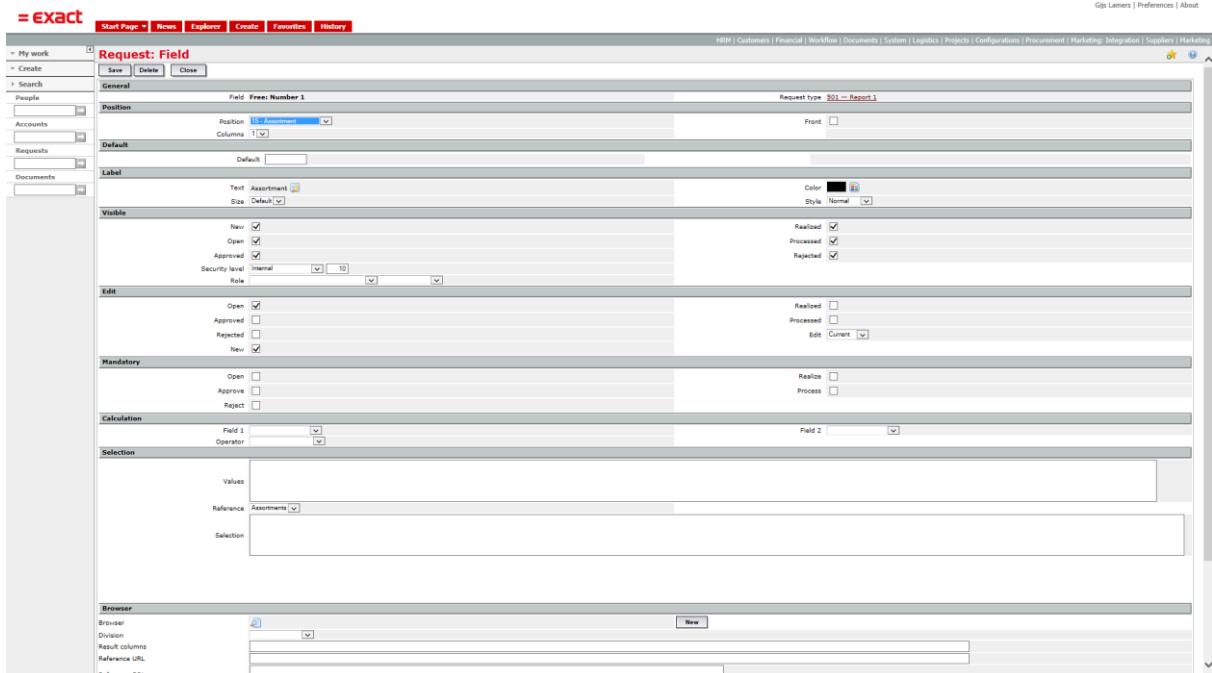
#### 4.9.5 Item field depending on assortment freefield: Browser dependency on other request field in the request

You can add a standard item request field to the request which has a selection option this selection is fixed and can't be made dependable on other fields in the request. This is possible with the browse field option.

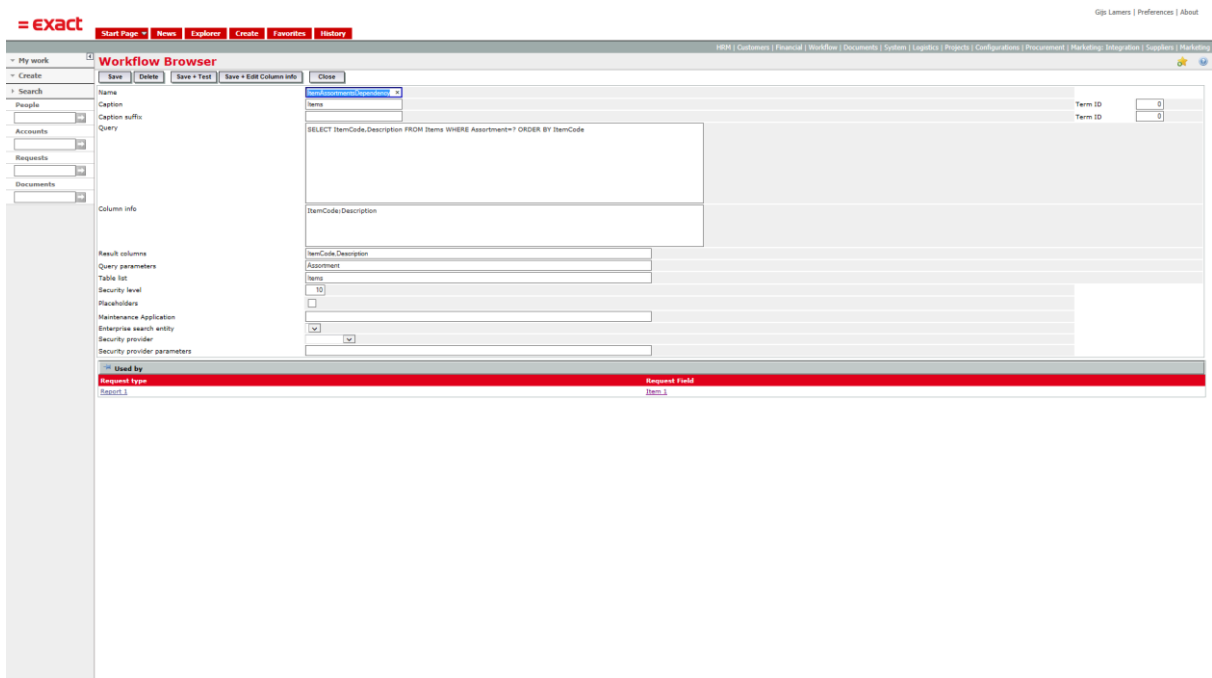
In addition to the free fields having the browse section to link your own browser also the standard browse request field like item1, item2, person and project will have the browse section to link your own browser. This browse will then replace the standard browser.

In this example we will make a browser which will be depending on an assortment freefield. In this case when browsing only the items will be shown which are linked to the selected assortment.

We will use free number field 1 as the assortment field with the standard reference selection: Assortments.



For the standard item field we will create a new item browser 'ItemAssortmentsDependency', this browser will replace that standard browser.



The **Query** 'SELECT ItemCode,Description FROM Items WHERE Assortment = ? ORDER BY ItemCode. The '?' will be replaced by the value in the field which is the reference field in this case the Number field 1.


The **Column info** 'ItemCode;Description' can be maintained via the 'Save + Edit Column info'.

The **Result columns** 'ItemCode,Description' are the key and the description which should be shown at the browser, the fields are separated by a ','.

The **Query parameters** 'Assortment' will be the field/column which has the '?' in the where clause. This field need to be linked to the field on which the item browser is depending. The Dependency field in the request field maintenance.

The **Table list** 'Items' is the list of tables in the query including the alias if used, separated by a ','.

Once the browser is setup and saved and the Item request fields is opened in the browser section you will see a field 'Dependency: Assortment' and a dropdown box with all the request fields. Select the Free number field 1 (in this case Assortment field as this is the label given to the free number field 1). After saving the item request field the item browse will be depending on the assortment field.



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100% | Customers | Financial | Workflow | Documents | System | Logistics | Projects | Configurations | Procurement | Marketing | Integration | Support | Marketing

My work
Create
Search
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Request: Field

Save Delete Close

General

Field Item 1

Request type SQL - Report 1

Position

Position: Select Item 1

Columns: 1

Front

Default

Default

Label

Text

Size: Default

Color

Style: Normal

Visible

☒ New  
☒ Open  
☒ Approved  
☐ Internal  
☐ 10  
☐ Role

☒ Realized  
☒ Processed  
☒ Rejected

Edit

☒ Open  
☐ Approved  
☐ Rejected  
☒ New

☐ Realized  
☐ Processed  
☐ Edit Current

Mandatory

☐ Open  
☐ Approve  
☐ Reject

☐ Realize  
☐ Process

Dependency

☐ Account  
☐ Person

☐ Project  
☐ Item 2

Selection

Status: Active  
Contract: All Items

Status: Approved Active

Workflow

Country

Browser

ItemAssessmentsDependency
New

Division  
Dependency: Assortment  
Result columns  
Reference URL  
Reference SQL

The screenshot displays the 'Exact Synergy Enterprise' web application interface. A 'Browse Dependency - New' dialog box is open, showing a table of items. The table has two columns: 'ItemCode' and 'Description'. The items listed are:

ItemCode	Description
12124	To Be Changed
4123	Adventure Bike.LW Black
BXKE HORN	Mechanical Bike Horn
BXKEAS	Adventure Bike.LW Black
BXKE-DAVE	Adventure Bike.LW Black
BXKEDEND	Adventure Bike.LW Black-E
BXKE-OSHD	Adventure Bike.LW Black
ITEMS PER QUOTE	Items per quote
EN1	Serial Number Component 1
EN-1	Serial Number Component 1
EN-2	Serial Number Component 2
EN-3	Serial Number Component 3
EN-4	Serial Number Component 4

The dialog box also includes a search bar, 'Reset', 'Clear', and 'Close' buttons. At the bottom, there is a 'Page size' selector set to 15 and a 'Show' button. The background shows the main application interface with a sidebar and a top navigation bar.







## 5. Reference fields

The reference fields feature will allow to show additional data based on other fields in the request. You can show for example address data, phone number, email address from the account field in the request. The data to be shown will be entered in the request field by defining the database fields.

When adding a new request free text field the following section will be available

Reference	
Dependency	<input type="text"/>
Column name	<input type="text"/>
Join table	<input type="text"/>
Join Clause	<input type="text"/>

**Dependency:** The field on which the reference is depending

**Column name:** The column name of the data to be displayed

**Join table:** The table to join on the dependency column, the join table will be used in case you want to display data which is not in the dependency table but in a related table.

**Join clause:** The join clause for the join table

### 5.1.1 New reference: email + phone number of person

Reference	
Dependency	Person
Column name	mail + char(13) + telnr_priv
Join table	
Join Clause	

Mail and telnr\_prv are columns in the humres table for email address and phone number (the table used by the person field). By separating them with '+' char(13) '+' they phone number will be displayed below the email address.

FreeField Reference and browse - 00.034.643

Status : Open Modified : Gips Lamera 09/24/2013 16:51

Create	Approve
Gips Lamera 09/22/2013 22:43	Gips Lamera Manager Person

Person Gips Lamera — CEO — Integrated

[gips@gmssystema.com](#)  
616-262-5178

### 5.1.2 New reference: address detail for parent account

Reference	
Dependency	Account
Column name	ISNULL(c2.cmp_fadd1,") + char(13) + ISNULL(c2.cmp_fadd2,") + char(13) + ISNULL(c2.cmp_fadd3,") + char(13) + ISNULL(c2.cmp_fadd3,") + char(13) + ISNULL(c2.cmp_fpc,") + "" + ISNULL(c2.cmp_fcity,")
Join table	cicmpy c2
Join Clause	c2.cmp_www = cicmpov.cmp_parent

The column name adds the address 1, address 2, address 3, postcode and city together. The join table is the accounts table and the join clause is the join to the parent account. The ISNULL is used in the query in case one of the columns doesn't have a value otherwise the result will always return 'NULL'.

The result in the request will look like below

FreeField Reference and browse - 00.034.643

Status : Open Modified : [Gis Larners](#) 09/24/2013 16:51

[Save](#) [Refresh](#) [Delete](#) [Copy](#) [Approve](#) [Reject](#) [Close](#)

[Create](#) ➡ [Approve](#)

[Gis Larners](#) [Gis Larners](#)

09/22/2013 22:43 Manager: Person

Person [Gis Larners](#) — CEO — Integrated

[gls@gmsystems.com](#)

815-226-9479

Account 287383 [Swedish American - Midtown - United States of America - Customer - Active](#)

1401 East State Street

61060 Skokie, IL

## 5.2 Role Access Level

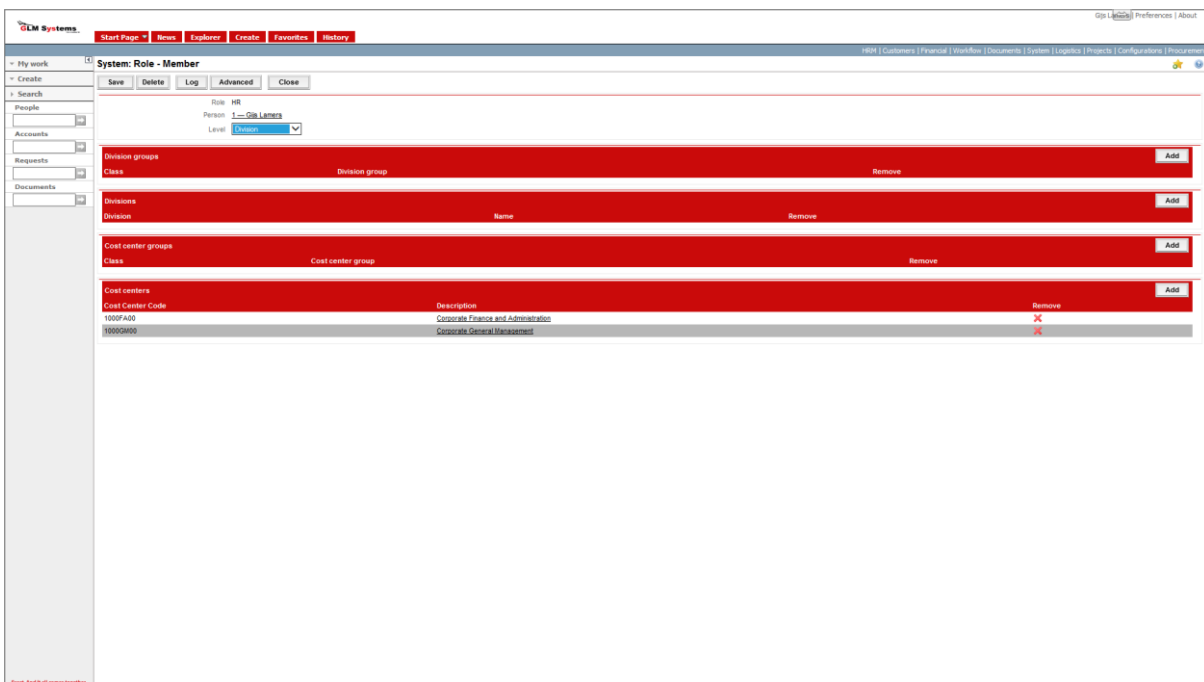
In Synergy you have the option to assign a role to a person with one of the following levels: corporate, group, division, cost center group and cost center.

When the division level is assigned for a role and this is also linked in a request type with the level division the person(s) which have the division level will get the request assigned.


Now I have a scenario where in a division one or more persons in the HR cost center should get a request for the cost centers HR, IT and Finance and not for Operations. The requirement is that only the request which have the person from HR or IT or Finance should be assigned to the person(s) in the HR cost center. With the current standard implementation of the role levels this is not possible. When I set the level to division also requests for the operations cost center will be assigned to the person responsible for HR, IT and Finance. Setting the level to cost center group could be possible but in this case HR, IT and Finance are not in the same cost center group. Setting the level at cost center will also not work as the request for cost center HR, IT and Finance should be routed to the HR person(s).

The new role access level workflow plus feature will make this possible as for each role linked to a person additional division group(s), division(s), cost center group(s) and/or cost center(s) can be added. So in this case we can add the HR, IT and Finance cost center to this person role. This means that this person will only get a request assigned when a person is in the HR, IT or Finance cost center and not in Operations.

Below screenshot shows that two cost centers are assigned to the HR role on division level for Gijs Lamers.



In the request the realize step is for persons in the HR division role. The person linked to the request is not in the cost center linked to Gijs Lamers so he will not be assigned.



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**Role Access Level - 00.034.866**  
Validated - Approved

Modified: **GLM Systems** 09-01-2014 19:23

**Create**  

GLM Systems

29-11-2013 00:26

**Accounts**  

10966

**Approve**  

GLM Systems

09-01-2014 19:23

**Realize**  

GLM Systems

Role: HR

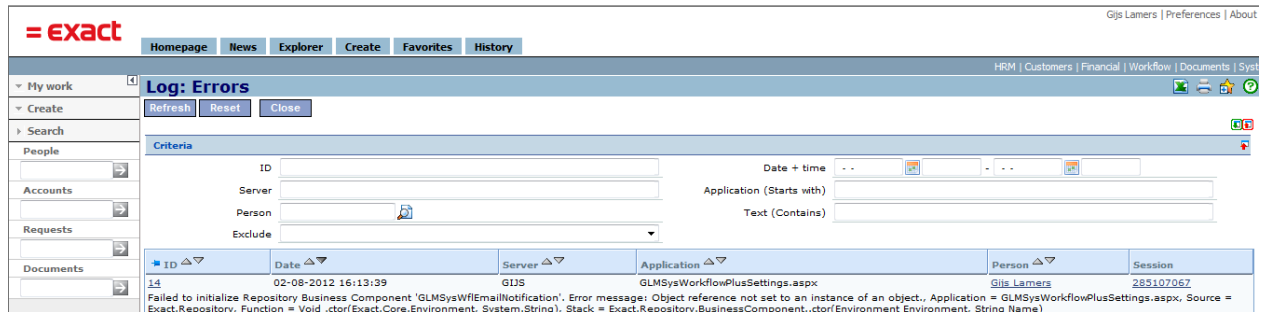
Level: Division

**Person**  
 Description  
 Security level  
 Start date  
 End date

10966 — Michael Robertson — Production Staff — Integrated  
 test  
 Internal: 10  
 29-11-2013

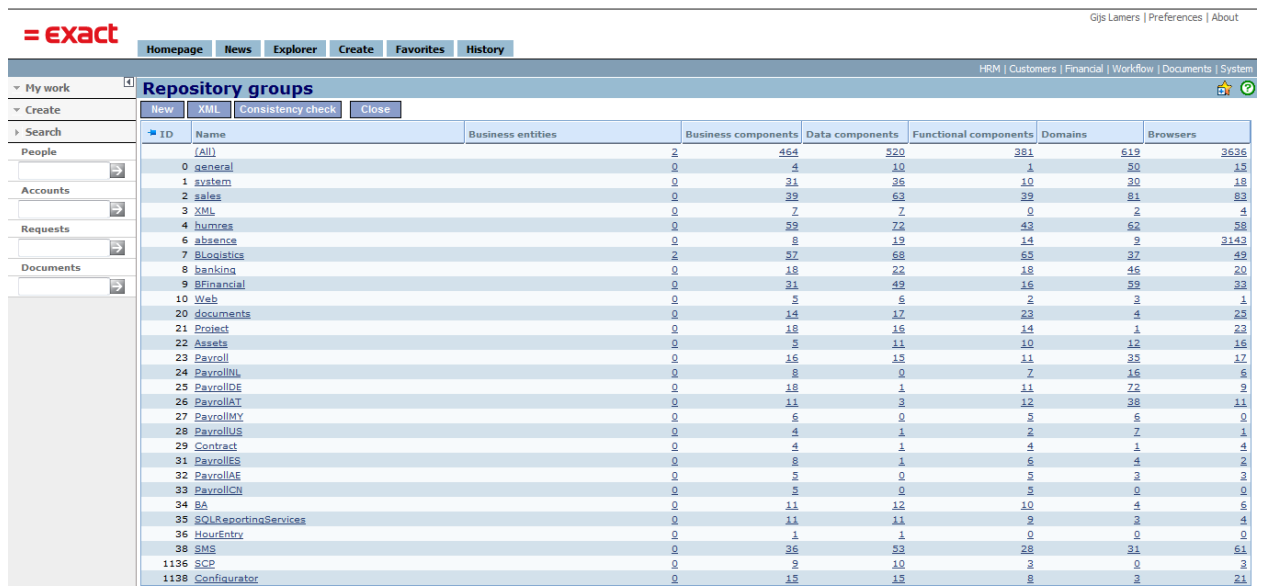
## 6. Troubleshooting

### 6.1 Opening workflow plus settings: Failed to initialize Repository Business Component 'GLMSysWfEmailNotification'.....



The screenshot shows the 'Log: Errors' window in the GLM Systems application. The error message is: "Failed to initialize Repository Business Component 'GLMSysWfEmailNotification'. Error message: Object reference not set to an instance of an object., Application = GLMSysWorkflowPlusSettings.aspx, Source = Exact.Repository, Function = Void .ctor(Exact.Core.Environment, System.String), Stack = Exact.Repository.BusinessComponent..ctor(Environment Environment, String Name)".

This message is caused by a missing repository for the workflow plus add-on. To confirm the repository is missing you can look at the repository (System / Setup / Repository / Explorer)



The screenshot shows the 'Repository groups' window in the GLM Systems application. The table lists various repository groups, but GLMSys.WorkflowPlus and zGLMSys.WorkflowPlus are missing from the list.

ID	Name	Business entities	Business components	Data components	Functional components	Domains	Browsers
0	general	2	464	520	381	519	3636
1	system	0	4	10	1	56	13
2	sales	0	31	26	10	30	19
3	XML	0	39	63	39	81	83
4	humanres	0	2	2	0	2	4
6	absence	0	59	72	43	62	58
7	logistics	0	8	19	14	9	3143
8	banking	2	37	68	65	37	49
9	financial	0	18	22	18	46	20
10	web	0	31	49	16	59	33
20	documents	0	5	6	2	3	1
21	project	0	14	17	23	4	25
22	assets	0	18	16	14	1	23
23	payroll	0	2	11	10	18	16
24	payrollNL	0	16	13	11	35	17
25	payrollDE	0	8	0	7	16	6
26	payrollAT	0	18	1	11	72	9
27	payrollMY	0	11	3	12	38	11
28	payrollUS	0	6	0	5	6	0
29	contract	0	4	1	2	7	1
31	payrollES	0	4	1	4	1	4
32	payrollAE	0	8	1	6	4	2
33	payrollCH	0	5	0	5	2	3
34	BA	0	5	0	5	0	0
35	SQLReportingServices	0	11	12	10	4	5
36	HourEntry	0	11	11	2	3	4
38	SMS	0	1	0	0	0	0
1136	SCP	0	36	53	28	31	61
1138	Configurator	0	9	10	3	0	3
		0	15	15	8	3	21

In the above screen shot you don't see the group GLMSys.WorkflowPlus and zGLMSys.WorkflowPlus. Which indicates the repository is missing.

Check the Synergy installation folder and see if the files Repository.GLMSys.WorkflowPlus.xml and Repository.zGLMSys.WorkflowPlus.xml are available in your Synergy installation xml folder.

When the two files are available the repository need to be rebuild. Rebuilding the repository is done via System / Setup / Repository / Rebuild.

After the rebuild the group GLMSys.WorkflowPlus and zGLMSys.WorkflowPlus should be visible in the repository explorer, System / Setup / Repository / Explorer

**= exact** Gijs Lamers | Preferences | About

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HRM | Customers | Financial | Workflow | Documents | System

My work

Create

Search

People

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Requests

Documents

### Repository groups

New XML Consistency check Close

ID	Name	Business entities	Business components	Data components	Functional components	Domains	Browsers
(All)		2	462	524	283	619	2626
0	general	0	4	10	1	50	15
1	system	0	31	36	10	30	18
2	sales	0	29	63	29	81	83
3	XML	0	2	2	0	2	4
4	humres	0	32	72	43	52	28
6	absence	0	8	12	14	9	2143
7	Logistics	0	57	68	65	37	49
8	banking	0	18	22	18	45	20
9	Financial	0	31	49	16	59	33
10	Web	0	5	6	2	3	1
20	documents	0	14	17	23	4	25
21	Project	0	18	16	14	1	23
22	Assets	0	5	11	10	12	16
23	Pavroll	0	16	15	11	25	17
24	PavrollNL	0	8	0	7	16	6
25	PavrollDE	0	18	1	11	72	9
26	PavrollAT	0	11	2	12	28	11
27	PavrollMY	0	6	0	5	5	0
28	PavrollUS	0	4	1	2	7	1
29	Contract	0	4	1	4	1	4
31	PavrollES	0	8	1	6	4	2
32	PavrollAE	0	5	0	5	3	3
33	PavrollCN	0	5	0	5	0	0
34	BA	0	11	12	10	4	6
35	SQLReportingServices	0	11	11	9	3	4
36	HourEntry	0	1	1	0	0	0
38	SMS	0	36	53	28	31	61
1136	SCP	0	2	10	2	0	2
1138	Configurator	0	13	13	8	2	21
2257	GLMSys.WorkflowPlus	0	2	2	0	0	0
2258	GLMSys.WorkflowPlus	0	2	2	2	0	0

Open the workflow plus settings again and the message will be gone.

## 6.2 Opening a request: Non-existing property 'WorkflowOrigin' retrieved for Repository business Component

**= exact** Gijs Lamers | Preferences | About

Homepage News Explorer Create Favorites History

HRM | Customers | Financial | Workflow | Documents | System

My work

Create

Search

People

Accounts

Requests

Documents

### Log: Errors

Refresh Reset Close

Criteria

ID

Server

Person

Exclude

Date + time --  --

Application (Starts with)

Text (Contains)

ID	Date	Server	Application	Person	Session
11	02-08-2012 15:23:15	G135	WfRequest.aspx	Gijs Lamers	285107067

Non-existing property 'WorkflowOrigin' retrieved for Repository Business Component 'Request', Application = WfRequest.aspx, Source = Exact.Repository, Function = Exact.Repository.ERProperty.get\_Prop (System.String), Stack = Exact.Repository.BusinessComponent.get\_Prop(String Name)

See solution given in 4.1.1. The repository needs to be rebuilt.

## 6.3 Repository failed to create class "GLMSys.WorkflowPlus.Repository.RequestExtension' from assembly

When opening a request and you get the message 'Repository failed to create class "GlmSys.WorkflowPlus.Repository.RequestExtension" from assembly "GlmSys.WorkflowPlus.Repository": could not load file or assembly "GlmSys.WorkflowPlus.Repository.dll" or one of its dependencies. The system cannot find the file specified' this is most likely after you have uninstalled the workflow plus add-on.

To remove this message a repository rebuild need to be done. After rebuild of the repository this message will not be shown anymore.

## 6.4 Workflow email notification: Failure sending email. The remote name could not be resolved '[your email server]'

This message is given when there is no internet connection. Make sure you have a connection.

## 6.5 Workflow email notification: Value cannot be null. Parameter name address

This message is given when the email address is not set for the person who should receive the email. Check the persons who are supposed to get the email and confirm the email field is set.

**= exact** Gijs Lamers | Preferences | About

Homepage News Explorer Create Favorites History

HRM: Person - 1, Gijs Lamers HRM | Customers | Financial | Workflow | Documents | System

Created: 27-07-2012 16:34 Modified: Gijs Lamers 15-08-2012 16:33

[Edit](#)
[Mail merge](#)
[vCard](#)
[Activities & material](#)
[Personal rates](#)
[Hour & expense entry](#)
[Offline hours import](#)
[Close](#)

General	
Name	Gijs Lamers
Status	Active (1 Months), 1.00 FTE
Time	15-08-2012 10:33
Action: Last	15-08-2012 16:33 (0 Minutes)
Office phone	
Extension	
Mobile	
Mobile extension	
E-mail	
Physical location	
Contractual location	
Room	

Organization	
Division	001 — Deltabike Holding N.V.
Manager	Assistant
Subordinates	2
Security level	15
Job group	General & Management
Job activity	Holding General
Job title	CEO
Focus	

Employment	
Type / User name	Employee Gijs Lamers
FTE	1.00
Start date	27-07-2012
Inactive	
Blocked	
Contract end date	
Purchase limit	€ 0.00

Monitor	
Accounts	Calendar
Documents (Recent)	Items
Projects	Dossier
Workflow	Reports
Documents	Planning
Transactions	

Personal	
Nationality / Language	EN — English
First name / Initials	Gijs
Middle name	
Last name	Lamers
Maiden name	
Place of birth	
Date of birth	
Marital status	
Marital status date	
Address / Number	<a href="#">Map Route</a>
Address 2	
City / State	
Country	Netherlands
Home phone	
Mobile	
Home e-mail	gijs@glmssystems.com

Roles	
Role	Level
Administrator	Corporate
Marketing manager	Division
General manager	Corporate
Professional	Division
Enabling add-on solutions	Division
Reseller manager	Corporate
Production manager	Division
HR	Division

## 6.6 Server Error or Compilation error

Server Error in '/Synergy' Application.

### Compilation Error

**Description:** An error occurred during the compilation of a resource required to service this request. Please review the following specific error details and modify your source code appropriately.

**Compiler Error Message:** BC32206: The project currently contains references to more than one version of Exact.Core, a direct reference to version 5.0.0.336 and an indirect reference (through GLMSys.WorkflowPlus.PageExtension.WorkflowPlusSettingsExtension.New\*) to version 5.0.0.338. Change the direct reference to use version 5.0.0.338 (or higher) of Exact.Core.

**Source Error:**

```
Line 93: Dim workflowPlusSettings As GLMSys.WorkflowPlus.PageExtension.WorkflowPlusSettingsExtension
Line 94:
Line 95: workflowPlusSettings = New GLMSys.WorkflowPlus.PageExtension.WorkflowPlusSettingsExtension(Page, env)
Line 96:
Line 97: If IsNothing(Employee.Value) Then
```

Source File: C:\Synergy\docs\GLMSys\WorkflowPlusSettings.aspx Line: 95

[Compiler Warning Messages:](#)

[Show Detailed Compiler Output:](#)

When opening the workflow plus settings application and a message as shown above is given this means there is a conflict in versions.

In this case let your vendor know which Synergy version you are currently using to make sure the correct version of the workflow plus settings tool is installed.

To solution for this problem will be either updating Synergy to make sure you have the latest versions of all components or installing a different version of the Workflow Plus tool.

## 6.7 Email is not send out and no message in the error log (1)

Open the Exact.ServiceLocation.config in your Synergy installation XMD folder and check if the following line can be found:

```
<service name="GLMSysWflSendEmail" path="xmd\Exact.Metadata.GLMSysWflSendEmail.xml"
bcname="GLMSysWflSendEmail" description="Workflow send email"
operationsprovidername="Exact.EntityOperations.ESE"
entitiesoperationprovidername="Exact.EntitiesOperations.ESE" fixedcriteriapath="" />
```

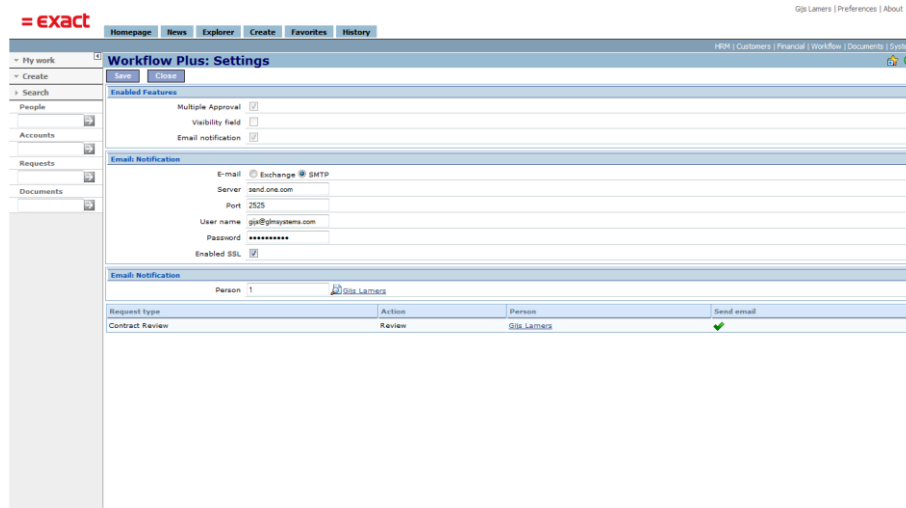
In case this line is missing in the Exact.ServiceLocation.config run the 'Generate metadata' as described in paragraph 2.3. After running the generate metadata run an IISRESET

## 6.8 Email is not send out and no message in the error log (2)

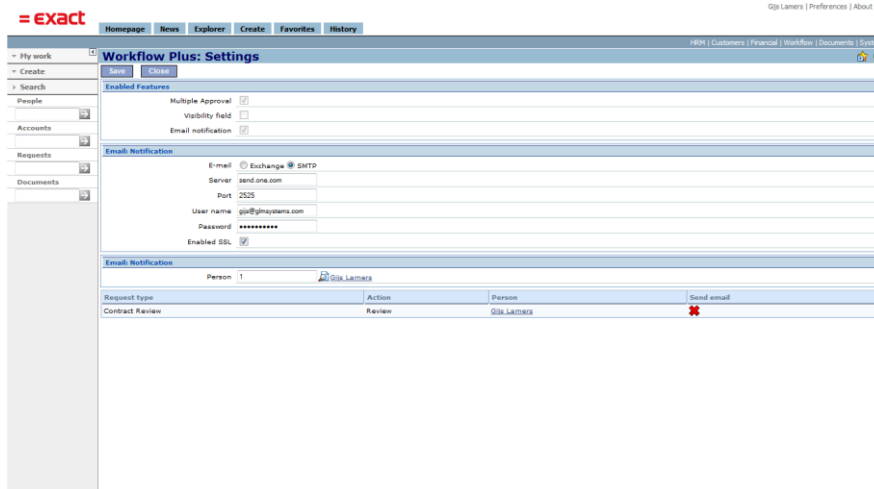
This can be related to the workflow plus settings as described in paragraph 3.4.

In the section Email: notification there is a list where you can see per person if an email need to be send. First select the person which is not receiving any email.

In case the send email column has a green check this person will receive an email for the related request action. In case the send email column has a red cross this person will not receive an email for the related request action.



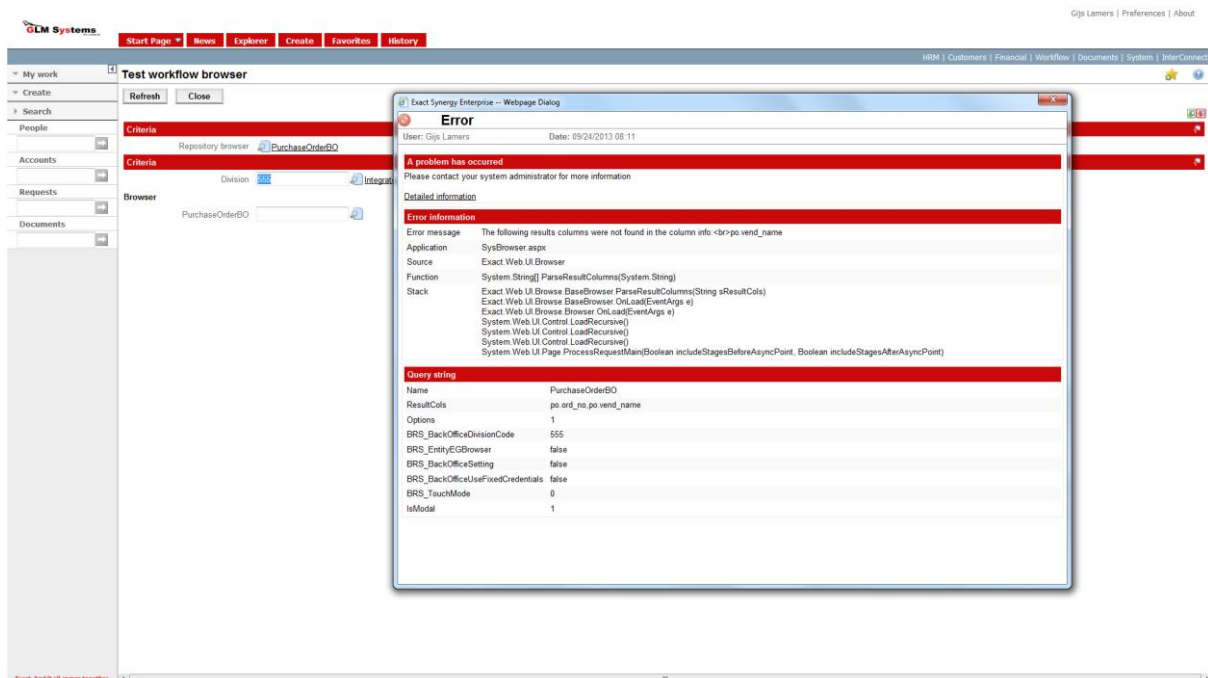
Request type	Action	Person	Send email
Contract Review	Review	SIL LAMERS	✓



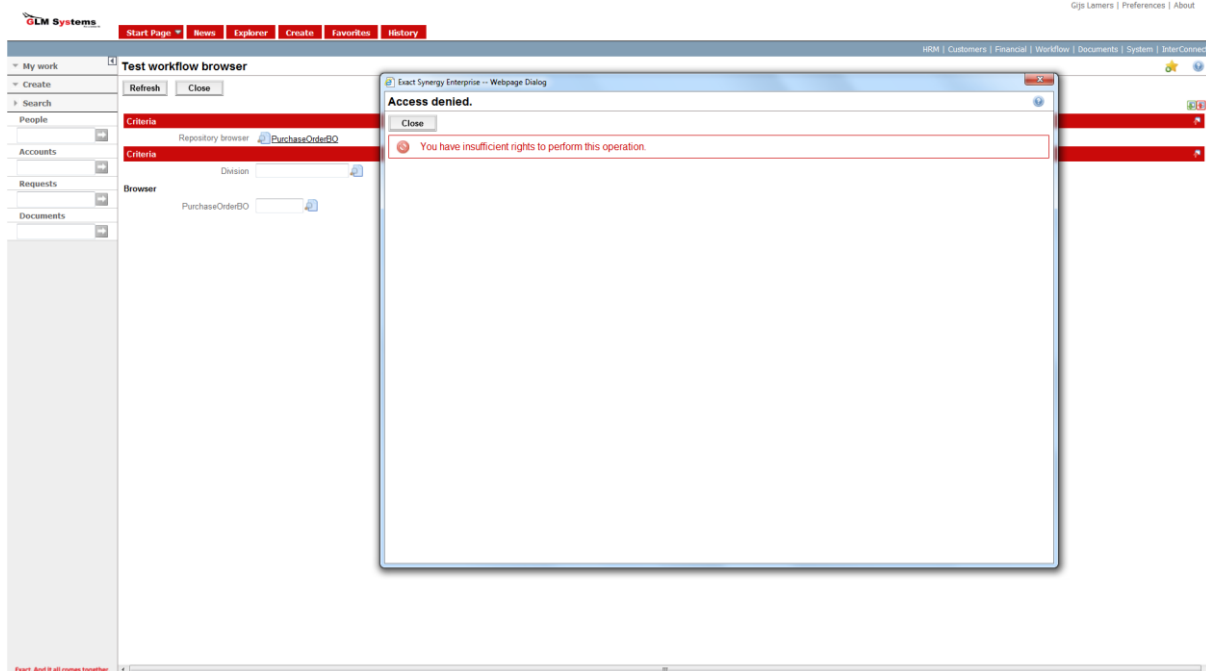
For persons which are newly created these need to be selected via the person field, upon selection the correct entries will be created and this person also will receive the email the person is related to the workflow.

## 6.9 Browser: The following result columns where not found in the column info

This happens when the columns specified in the result columns are not in the colinfo. Change the result columns in the browse to use the correct columns.







### 6.11 No Valid License Installed

When an error message like this appears, please contact us so that we can review your Synergy Enterprise license from Exact and determine if changes were made to it that affect the GLM Licensing.

#### Error Message

WorkflowPlus  
No valid license installed.  
Number: 140965:101:007  
Name: Exact Synergy Enterprise.

We are recommending that accounts before they update their Synergy License (either for new Functionality, Annual Contract or Additional Users – we are contacted first so that we may review and if necessary, provide a new license proactively.

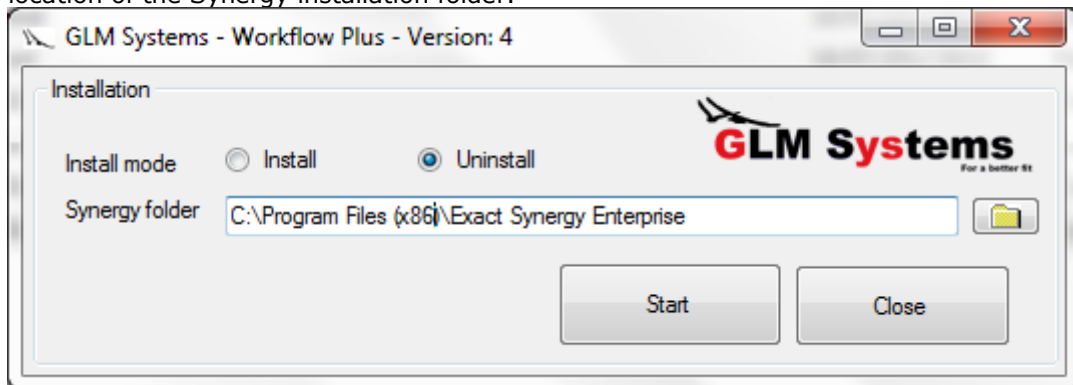
## 7. Uninstall

---

Uninstalling of the Workflow Plus add-on consist of two steps

1. Run the installer GLMSysAddOnInstaller.exe in the uninstall mode

Open the GLMSysAddOnInstaller.exe and select install mode 'Uninstall'. Select or enter the location of the Synergy installation folder.



To uninstall click start. The uninstall will remove the customization files from your Synergy folder and will copy back the original Synergy files.

2. Rebuild repository

To make the uninstall complete open Synergy and rebuild the repository via System / Setup / Repository / Rebuild.